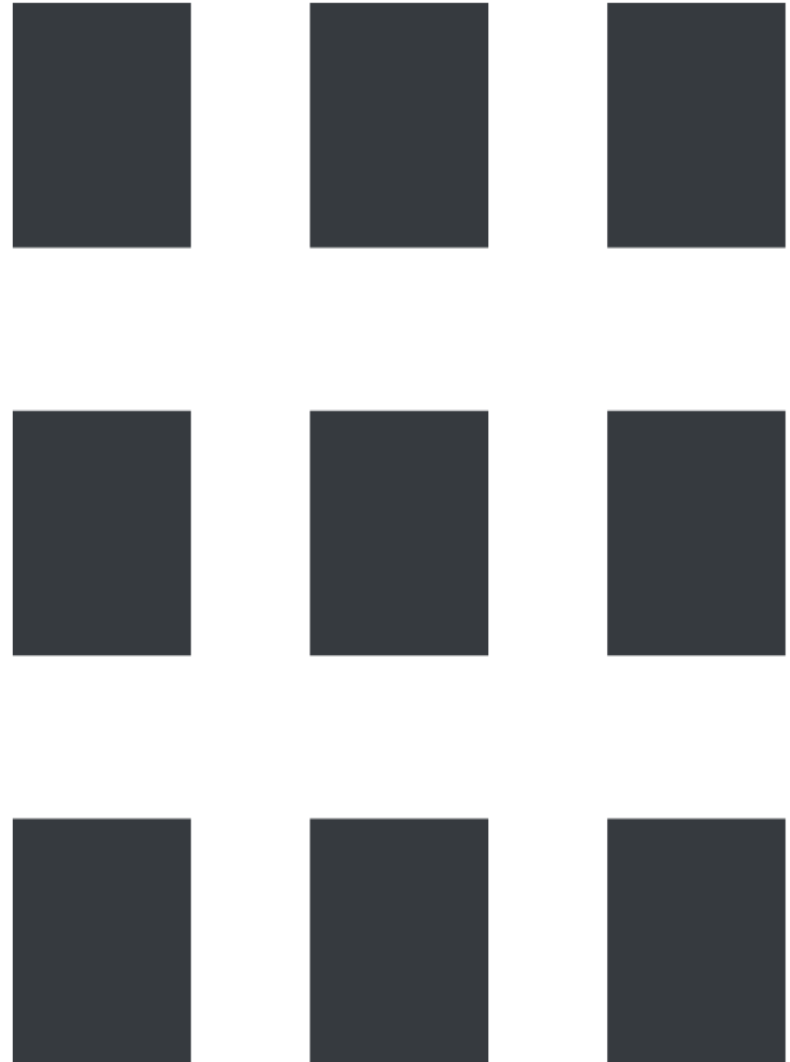




# 9 GRID

## POTENTIAL VS PERFORMANCE

Coach for Performance



## CONTENTS

What is the nine-box performance grid? .....	3
Benefits of the Grid.....	3
How does the nine-box performance grid work?.....	6
Coaching Tips for Each Category.....	6
How to create your Potential vs Performance Grid.....	8
Message from Dr. Cynthia Howard .....	10

## WHAT IS THE NINE-BOX PERFORMANCE GRID?

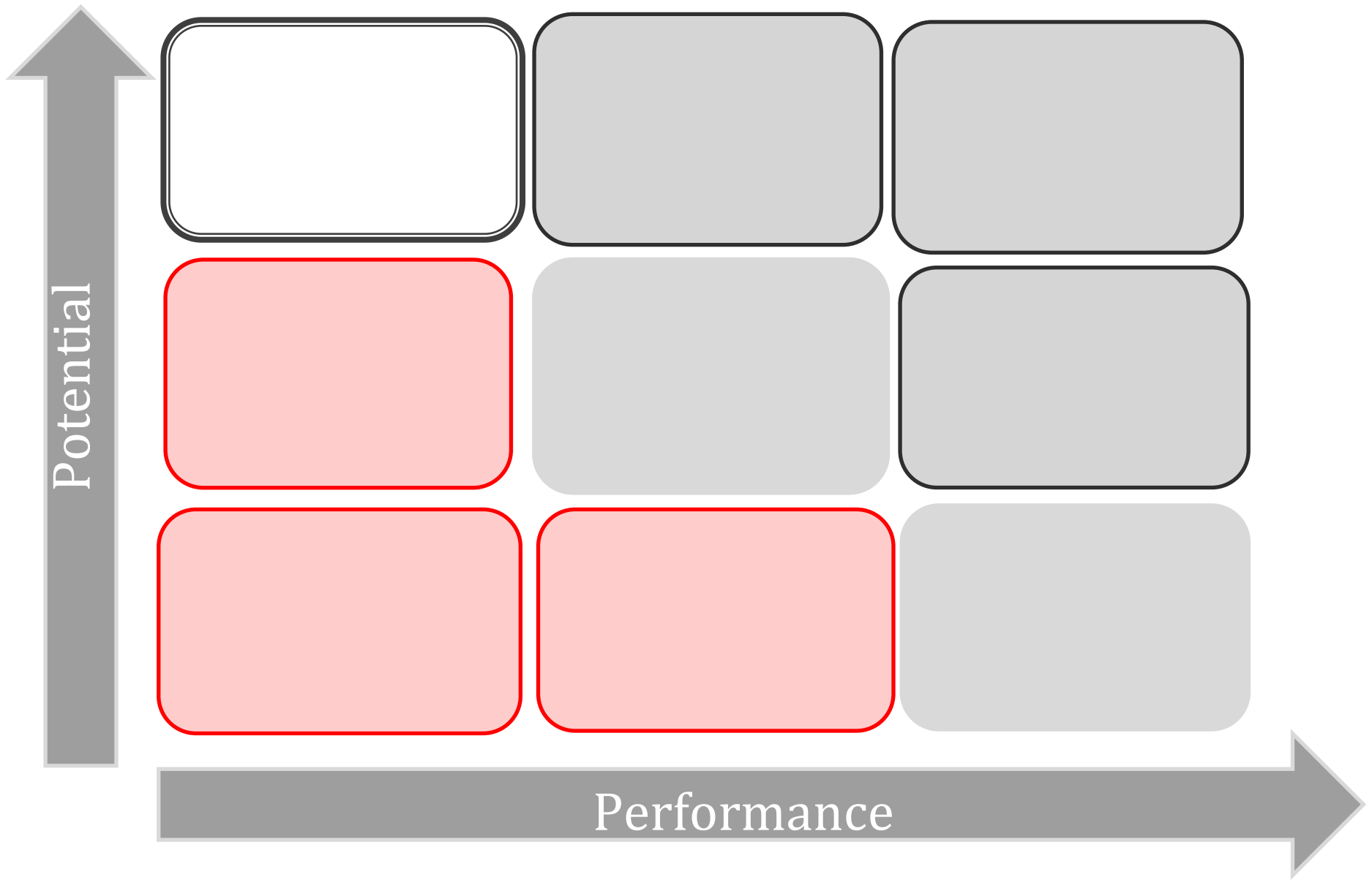
The nine-box performance grid is an assessment tool used by managers to evaluate employee performance and growth potential. The grid will give you a quick visual to assess the strengths and weaknesses of your department's talent. When used collaboratively with HR or your executive team, you can develop long term strategies to improve your staff.

The number of the grid can vary depending on the organization and the level of detail that is established for professional development process.

### *Benefits of the Grid*

The benefits of using the nine-box performance grid gives you an overview of what your team needs in the way of development. This provides the data to present your case to HR or executive leadership for approval on a professional development plan.

- 1.) The overview helps you set up your succession plan to map to your future leaders. The grid helps you recognize an employee's strengths and weaknesses and determine what is possible for future roles.
- 2.) Are people in the best role for them? As you evaluate where people are you might explore if someone's poor performance is because they are not well suited for the role. The grid allows you to determine whether employees can meet the job's expectations, or if action is required. For example, if an employee is underperforming, you could move them to another role that better suits their skills or to another department or help them realize the company is not for them and help to move them out.
- 3.) Establishing performance standards. The potential performance grid helps you set up create clear standards to evaluate employees. Using this concept, you can set up those competencies that distinguish a high performer.
- 4.) Performance tracking. The grid and the evaluation you do with it allows you to coach the employee and clearly map out strengths and weaknesses, along with the plan to improve. This can be used in the coaching session.
- 5.) Team performance. Use this grid and develop performance standards for the department with the team. Have everyone contribute to the standards and identifiers and create an objective performance tool.



Identify the capacity of your team and the type of coaching that will best motivate them. Refer to the key below for coaching tips. Check out the *Shadow*.

<b>High Potential</b>	<p><b>Diamond in the rough?</b> Demonstrates the right attitude however may need additional skills. Coaching is focused on skill development and mentoring.</p> <p><b>Shadow: It is possible another department or position would better suit their talents.</b></p> <p><b>High potential. Low performance.</b></p>	<p><b>High Potential</b> Achieving goals. Attitude may not match org and having negative impact on team. Work on aligning attitude.</p> <p><b>Shadow: Harder to change attitude. Could get bored easily. Can drain mgr's energy.</b></p> <p><b>High potential. Moderate performance.</b></p>	<p><b>Star Performer</b> Team player, achieving goals. Focus coaching on their goals and continuous improvement. Could be a mentor to others.</p> <p><b>Shadow: Could be impatient re: their advancement</b></p> <p><b>High potential. High performance.</b></p>
	<p><b>Inconsistent performer</b> Not achieving goals or performing well. Rapid response coaching.</p> <p><b>Shadow: Could be situational however stay focused on their performance.</b></p> <p><b>Moderate potential. Low performance.</b></p>	<p><b>Core Performer</b> Achieving goals, attitude steady. Focus coaching on more engagement, skill development.</p> <p><b>Shadow: May be bored easily, distracted. Needs more daily direction.</b></p> <p><b>Moderate potential. Moderate performance.</b></p>	<p><b>High Performer</b> Team player, achieving goals. Focus coaching on their performance to support steady, consistent performance &amp; attitude.</p> <p><b>Shadow: If pushed beyond what they perceive as their capability, will shut down.</b></p> <p><b>Moderate potential. High performance.</b></p>
	<p><b>High risk individual</b> Not achieving goals or performing well. Rapid response coaching: Demonstrate quick turnaround or move the person out.</p> <p><b>Shadow: This person acts like an anchor weighing the team down.</b></p> <p><b>Low potential. Low performer</b></p>	<p><b>Average performer</b> Basic achievement in behavior and outcomes. This group is a steady producer. Find out what motivates this person.</p> <p><b>Shadow: They often slip under the radar. Do not over-reward or you could eliminate all incentive.</b></p> <p><b>Low potential. Moderate performance.</b></p>	<p><b>Reliable performer</b> Achieving goals. May not take on more responsibilities. Coaching focus on supporting their performance.</p> <p><b>Shadow: The consistent performance may be undervalued due to low potential.</b></p> <p><b>Low potential. High performance</b></p>
<p><b>Low Performance High</b></p>			

## HOW DOES THE NINE-BOX PERFORMANCE GRID WORK?

The grid reflects growth or potential on the Y axis and performance on the X axis. By measuring an employee's growth and performance you can evaluate what the employee needs in the way of a performance plan.

As you can see the top right corner reflect the "A team" or your top performers. They will need a different type of coaching than those on the lower left. Individuals in this box are the low-level performers, for whatever reason, are not producing.

The majority of your team may fall in between in the "Core Performer" category needing improvement which could be in skills, attitude, or consistency.

### Coaching Tips for Each Category

*Review the table above with additional coaching tips for each category.*

#### **High Risk: Low potential/low performance**

This individual could be the result of a bad hire or of an employee with problem behavior that has been ignored. Be cautious about investing too much time because not only does this person have the capacity to wear you out, as the manager, they also can burn out the high achievers and dampen the momentum and morale of the department.

Put this person on a fast-track Performance Plan. Provide specific measures to achieve in a specific period of time and if this is not achieved then move them to the next level of your performance schedule. Most likely this person will need to be moved out.

#### **Core Performers: Medium potential and performance**

This group is meeting their responsibilities but may not be able to take on more. This could be due to lack of skills or personal issues that have them do the basics of the job. Perhaps they have a new family or are caring for their aging parents. They are steady so it is important to keep them happy. Find out how you might incrementally stretch them which will build their confidence.

Check out the table and read through the **Inconsistent Performer, low performance, and medium potential**. Find out what needs to happen to have more consistent performance. This could be an attitude issue.

For the **Average Performer, medium performance, and low potential**, continue to coach them however accept this may be all this person can deliver. Incrementally stretch them to build more skills and assess their attitude. Be careful about overlooking this individual because they do not have the potential. This is the person who is showing up everyday and getting the work done.

### **Diamond in the Rough: High potential, low performance.**

This person could be fresh out of school or newly certified and simply needs to build skills. Provide mentoring and opportunity to develop the needed skills to move into higher performance.

### **Reliable Performer: High performance, low potential.**

This person is working consistently and achieving their goals but, either due to lack of skills or the personal capacity to stretch themselves at this time they do not have potential. Keep this person happy, however, beware of overcompensating as you may erode the little ambition that is there and turn this person into a high-risk individual.

### **Top Performers: High potential, high performance.**

At the very top right, these are your 'A' team players. They are excelling and eager to learn more. Continue to provide additional responsibilities, but not at everyone else's expense. Do not ignore others and create a morale gap. This group has the potential to shut down. They either want to move faster than is possible or they quickly exceed their capacity and fail which is not something they tolerate.

## HOW TO CREATE YOUR POTENTIAL VS PERFORMANCE GRID

Having this type of overview will help you set up a professional development plan and a succession plan to groom future leaders. Here are suggestions to create your grid.

### **1. Find out what competencies and distinguishing competencies are needed for optimal performance.**

Talk with executive leaders and HR to explore the competencies for each position. Update the competencies to be current with the demands of the department.

### **2. Set the criteria for potential and performance.**

Hold a meeting to discuss and identify the standard for performance and potential. These are subjective measures and having everyone contribute to the definition increases the general agreement. Performance measures should reflect an employee's ability to get promoted.

Use assessments (especially the EQi 2.0, emotional intelligence assessment) for leadership advancement to support and define the potential/ performance standards. It is important to be objective in order for the results to be fair and consistent.

### **3. Encourage an open discussion.**

Once you have standards set up and reached agreement on that, you can figure out where each employee fits on the grid. As you look at each employee think about their experiences, training, projects, and feedback they have received in the past along with how much they have grown – or not.

Have they been coachable? This helps you rate their growth potential. Encourage an open dialogue and objectively consider everyone's opinions.

Once you place employees within the grid, review the results to ensure the placement is accurate.

### **4. Set up regular reviews.**

Establish an annual review period for the grid itself and quarterly reviews for staff overview. Staff change and the demands in the department may also change. Reevaluating the grid will maintain its effectiveness by reviewing employees' progress as a result of their development plan.





## MESSAGE FROM DR. CYNTHIA HOWARD

Thank you for your purchase of this resource from the Work Smart Club! We are one of your biggest fans and want you to succeed!

We are committed to helping those leaders and professionals who want to move further ahead than they thought possible.

Now that you have this resource, you are part of the Club, your center for Work and Well-being.

Our mission is to transform the workplace through inspired and innovative leadership; we help you succeed and together, we achieve an amazing goal.

We love to know how this resource impacted you and what we can do to improve, I want to hear from you. Please tell us what you think:

- What insights did you get from this resource?
- Will you be changing how you do something? If so, in what way?
- Would you recommend this resource to others?
- Was something confusing or lacking in this resource?

Please email me at [contact@worksmart.club](mailto:contact@worksmart.club).

Stay energized!

*Dr. Cynthia Howard*

Dr. Cynthia Howard  
CEO, Chief Energy Officer, Work Smart Consulting  
Founder, Work Smart Club  
[www.worksmart.club](http://www.worksmart.club)