

SAMPLE

PERFORMANCE-POTENTIAL ASSESSMENT

Worksheet for populating the Performance and Potential 9-Box Grid: *Each succession planner should answer the following questions prior to placing individuals on the 9-Box to ensure consistency and remove any bias in assessing your employees' performance and potential.*

Employee Name: Betty Focus		
Defining Leadership Performance	Yes	No
1. Is self-motivated and results-focused with a solid history of high job performance and goal achievement	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Respectfully challenges the status quo, displaying creativity, innovation and progressive thinking; is open, and easily adapts to, new processes, perspectives and changes in business processes and practices, even when generated by others	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Is effective in resolving interpersonal conflict; displays an ability to stay focused on the situation and negotiate effective solutions.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Displays excellent verbal and written communication skills by delivering clear, concise and convincing messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. High standard of personal conduct: honest, trustworthy, accountable for their actions/responsibilities, and delivers on their promises	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Builds strong, positive relationships that create success for themselves and those around them; effective at mobilizing resources to respond to problems and opportunities as they arise	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Has a positive attitude, is inspiring and inclusive; collaborates and communicates respectfully and exemplifies a selfless, team-approach in accomplishing our mission	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8. Thinks strategically-understands and pursues opportunities that fit with broader strategy; applies good judgment in problem analysis and critical thinking	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. Eager to learn and grow, actively seeks personal development opportunities and excels at rapidly developing new skills necessary to successful job performance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. Actively solicits feedback, responds openly without defensiveness, and learns from feedback and alters behavior	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>To evaluate this employee's performance, calculate the number of "yes" responses (yes=1 pt.), check the score box below and find corresponding box on Tool 3B (9-Box) and record name. TOTALS</i>		
0-3 = Low <input type="checkbox"/> 4-7 = Medium <input type="checkbox"/> 8-10 = High <input checked="" type="checkbox"/>		

College/Division & Position: Asst. VP of Staff			
Defining Leadership Potential	Hi-2	Med-1	Low-0
1. Could the employee perform at a higher level, in a different position or take on increased responsibilities within the next year (consider the person's ability only, not whether there is a position available to support this growth)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Could the employee perform at a higher level, in a different position, or take on increased responsibilities within the next three years (consider the person's ability only, not whether there is a position available to support this growth)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Can you envision this employee performing two levels above his or her current position in the next five to six years ?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Is the organization likely to value growth of the skills and competencies of this employee over the next several years?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Could the employee learn the additional skills and competencies he or she needs to be able to perform at a higher or different level?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the employee demonstrate leadership ability—by showing initiative and vision, delivering on promised results, communicating effectively, and taking appropriate risks?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the employee display an ability to interact comfortably with people at a higher level or in different areas?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8. Does the employee demonstrate comfort with a broader organization perspective than his or her job currently requires?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the employee demonstrate flexibility and motivation to move into a job that might have different requirements than any they have held previously?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the employee welcome opportunities for learning and development?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>To evaluate this employee's potential, calculate the number of checked boxes in each column (Hi=2 pts., Med=1 pt., Low=0 pt.), check the score box below and find the corresponding box on Tool 3B (9-Box) and record name. TOTALS</i>			
0-6 = Low <input type="checkbox"/> 7-13 = Medium <input type="checkbox"/> 14-20 = High <input checked="" type="checkbox"/>			