



FOUR BRIDGES
A D V I S O R Y

9-Box: A Tool for Performance Management

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Talent Assessment Philosophy

- Assess your team talent with a consistent and open structure
- Create a "snapshot" of your team's talent; rating each member on current performance and potential for taking on more. *This should not be shared with team.*
- Should be normally distributed -- (top: 30% of people, middle: 65%, low: 5%)
- Phase out low performers to allow for upgraded skills and capability
- Be decisive, objective, and move quickly on changes needed
- Engage leadership at all management levels in active dialogue to ensure consistent calibration of talent
- Watch out for biases in perception of 'potential'; research shows we are biased to rate those similar to us (in background, gender, race) as having more potential than those different from us
- Push to raise the bar and upgrade skills

Talent Management Key Levers

- Develop and attract high caliber talent
- Continually look for ways to upgrade and build capability
- Establish and communicate performance expectations
- Link individual objectives to business priorities through goal setting; ensure alignment across the organization
- Provide clear accountability
- Set and stick to timing of assessment (i.e. annually, biannually, quarterly, etc.)
- Ensure clear link between performance and behaviors valued by the organization through rewards and recognition

Talent Management Key Levers

Assess and then plot each team member on the Matrix that follows to assess the overall team talent and create an action plan from there to grow your team even stronger.

Decisions made on individual team members should be based on objective assessment criteria.

Development or manage-out plans should be developed for each team member after the 9-box is complete.

9-Box Matrix Definitions

Performance

<p>Consistently produces exceptional results.</p> <p>Is not likely or does not wish to progress beyond current role</p>	<p>Consistently produces exceptional results, exceeds expectations. Will be able to move if provided with training or additional experience.</p>	<p>Consistently produces exceptional results, exceeds expectations.</p> <p>Has exceptional ability & desire to scale to broader role.</p>
<p>Produces good and consistent results, meets expectations.</p> <p>Is not likely or does not want to scale to broader role.</p>	<p>Produces good and consistent results, performing well.</p> <p>Will be able to move or expand role with training.</p>	<p>Produces good and consistent results, meets expectations.</p> <p>Has exceptional ability and commitment to scale to broader role.</p>
<p>Not meeting expectations.</p> <p>Is not likely or does not want to scale to broader role.</p>	<p>Not meeting expectations. Coaching or Performance Improvement Plan may be needed.</p> <p>Likely not in right role.</p>	<p>Employee has consistently produced exceptional results.</p> <p>Actively seeks out new opportunities and challenging assignments.</p>

Low

Solid

High

Potential

Definition of / Evaluating *Performance*

Performance = Results + Leadership

High	Employee has consistently produced exceptional results; exceeds expectations, is an inspirational leader
Solid	Employee has produced solid (good and consistent) results; meets expectations, impact player
Low	Employee is not meeting overall expectations; coaching and/or a Performance Improvement Plan may be recommended
Too New to Evaluate	Employee is too new to position (less than 6 months) to evaluate – typically a new hire

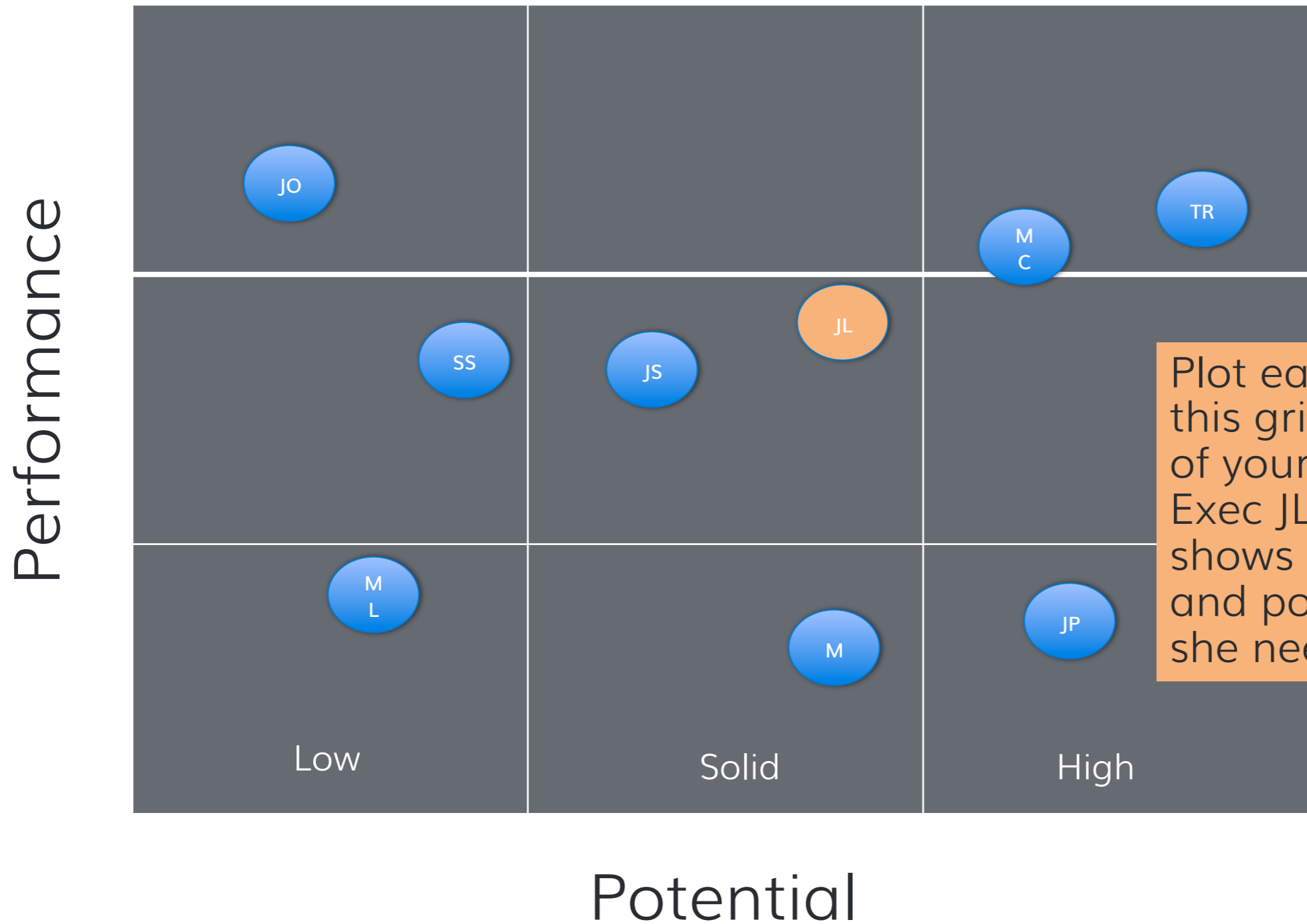
Definition of / Evaluating *Potential*

Potential = Ability + Commitment

High	Employee has exceptional ability and commitment to readily scale to a broader role; actively seeks out new opportunities and challenging assignments.
Solid	Employee will be able to improve if provided with development; has ability, and commitment* to take on a broader role; adapts to new situations as needed.
Low	Employee is not likely to scale <i>or</i> does not wish to progress beyond current role; lacks ability, commitment or aspiration to do more; may not effectively adapt to new situations.
Too New to Evaluate	Employee is too new to position (less than 6 months) to evaluate – typically a new hire.

*Avoid making any assumptions about commitment. Ask directly.

Example Performance and Potential Matrix



Plot each team member on this grid to get a "picture" of your team's strength. Exec JL (orange circle) shows solid performance and potential. What does she need to move 'up'?

Strategic People Action Plan

Develop an action plan based on the 9-box for each of your team members. It can look something like below. This should be updated on a regular cadence (quarterly?).

Develop and invest in the following people to groom them for additional responsibilities:

Person 2, Person 7, etc.

Solid performers but unlikely to grow-keep in place and maximize

Person 1, Person 6, etc.

Manage out of the organization:

Person 3, Person 9, etc.

Near term Hiring Plans:

Near term Development Plans: