

Did we set them up to succeed?

Before you evaluate performance, verify that the organization provided a reasonable opportunity to succeed.

EMPLOYEE

ROLE

REVIEWED BY

DATE

01 / **Clear expectations & documented processes**

Were role outcomes, performance standards, responsibilities, and necessary SOPs or procedures clearly provided?

☐ Yes

☐ No

☐ Not Verified

Date communicated:

If No or Not Verified, what is missing?

02 / **Training & demonstrated competency**

Was the employee trained and observed doing the work independently to standard, not merely repeating instructions?

☐ Yes

☐ No

☐ Not Verified

Last sign-off date:

Verified by:

If No or Not Verified, what is missing?

03 / **Tools, access & resources**

Were working equipment, software, logins, information, and resources provided, with training to use them?

☐ Yes

☐ No

☐ Not Verified

Date readiness verified:

If No or Not Verified, what is missing?

04 / **Performance visibility & feedback**

Were meaningful results or a scorecard reviewed with the employee in the past 14 days (ideally within 7)?

☐ Yes

☐ No

☐ Not Verified

Last review date:

Reviewed by:

If No or Not Verified, what is missing?

READ BEFORE MAKING A PERFORMANCE DECISION

If any answer is No or Not Verified, address and document that leadership gap before treating related performance concerns as an employee failure.

The employee may not currently have a reasonable opportunity to succeed. Set the standard, train, verify competency, supply the tools, and establish a regular review cadence first.

Independent misconduct or safety concerns may still require prompt action.

OBSERVABLE ASSESSMENT



Evaluate evidence. Not emotion.

Use observable examples from the last 60–90 days. Do not treat a missing leadership prerequisite as proof of an employee failure.

RATING	1 Rarely true	2 Inconsistent	3 Consistently	N/O Not observed
01 / PERFORMANCE				
Delivers the expected outcomes of the role	☐	☐	☐	☐
Produces work at the required quality and pace	☐	☐	☐	☐
02 / CAPABILITY				
Has the skills and judgment needed to succeed	☐	☐	☐	☐
Handles the complexity and decisions of the role	☐	☐	☐	☐
03 / OWNERSHIP & MOTIVATION				
Takes responsibility without repeated chasing	☐	☐	☐	☐
Shows effort and interest in doing the work well	☐	☐	☐	☐
04 / TEAM CONTRIBUTION				
Acts consistently with company values and standards	☐	☐	☐	☐
Builds trust and works constructively with others	☐	☐	☐	☐
05 / LEADERSHIP SUPPORT				
Expectations and priorities remain clear	☐	☐	☐	☐
Leadership provides useful feedback and support	☐	☐	☐	☐

Evidence behind the concerns

Identify the two or three most concerning observations and specific examples.

DO NOT TOTAL THE SCORES

Strong output does not offset harmful behavior. Weak results may reflect missing expectations, training, tools, or feedback. Look for patterns and verified causes.

ROOT CAUSE DIAGNOSIS

EIGHTFOLD
ADVANTAGE

Find the cause, not the symptom.

A missed deadline, unhappy customer, or poor-quality job tells you what happened. Your job is to find out why.

01 Capability gap

Wants to succeed but lacks skills, knowledge, or judgment.

CONSIDER Training, mentoring, or supported practice.

02 Ownership gap

Can do the work but does not reliably follow through.

CONSIDER Specific feedback, standards, and accountability.

03 Role mismatch

Has ability, but the responsibilities do not match strengths.

CONSIDER Role redesign or reassignment.

04 Behavior or trust

Conduct damages teammates, customers, or standards.

CONSIDER Prompt, direct behavior intervention.

05 Leadership / process gap

Unclear SOPs, inadequate tools, weak training, or delayed feedback.

CONSIDER Fix the operating system; then reassess.

ILLUSTRATION / KEEP ASKING WHY

Symptom: Technician repeatedly misses job documentation. First thought: "They don't follow the process." Dig deeper: No one verified the technician could complete the workflow independently. Root cause: Onboarding has no competency sign-off.

Corrective action: Verify training and add a repeatable sign-off step.

ROOT-CAUSE WORKSHEET

What is the observable problem (no labels or assumptions)?

What is causing it, and what evidence verifies that cause?

What needs to change so this does not recur?

BIAS CHECK

Would I reach the same conclusion if I did not particularly like or dislike this person?

DECISION & ACTION



Choose the next move.

An assessment without an owner, a deadline, and a follow-up is just paperwork. Assign responsibility to the employee, leadership, or both.

CHOOSE THE MOST APPROPRIATE ACTION

- ☐ **Coach** Clarify behaviors, commitments, and accountability.
- ☐ **Train** Develop specific knowledge or skills.
- ☐ **Reassign / redesign** Find a better match for the work.
- ☐ **Fix the environment** Correct missing processes, resources, or management support.
- ☐ **Consider separation** Review serious or persistent concerns using appropriate HR guidance.

30-DAY ACTION COMMITMENT

What specifically must change?

Employee-owned action(s) / person / due date

Leadership or process-owned action(s) / person / due date

What observable evidence will demonstrate improvement?

REVIEW DATE

RESPONSIBLE LEADER

THE 90-DAY QUESTION

If nothing changes in the next 90 days, would I be comfortable with this person continuing in this role?

- ☐ Yes
- ☐ No
- ☐ Not sure

EIGHTFOLD ADVANTAGE

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