

Do You Have the Right People?

Performance, Fit & Engagement Diagnostic



Think of one person in your organization you are unsure about.

Use the questions below to move beyond general impressions and identify what may actually be going on.

Person / Role: _____ Date: _____

1 CAN THEY DO IT? PERFORMANCE

Are they consistently delivering what the role requires?

- ☐ Expectations are clear.
- ☐ They understand what success looks like.
- ☐ They know how they are currently performing.
- ☐ They consistently deliver what the role requires.
- ☐ They receive regular, candid feedback.
- ☐ They have the resources and support needed to succeed.
- ☐ They have been given appropriate opportunities to improve.
- ☐ They are held accountable when expectations are not met.

Overall Assessment

☐ Strong ☐ Mixed ☐ Concern

What stands out?

2 DO THEY FIT? ALIGNMENT

Are they the right fit for our organization, and are they in the right role?

Values Fit	Do their behaviors align with the values and expectations of the organization?	☐ Strong ☐ Mixed ☐ Concern
Role Fit	Do their strengths, capabilities, experience, and natural wiring match what the role requires?	☐ Strong ☐ Mixed ☐ Concern
Future Fit	Can they, and do they want to, grow with where the organization is going?	☐ Strong ☐ Mixed ☐ Concern

Overall Assessment

☐ Strong ☐ Mixed ☐ Concern

What stands out?

3 DO THEY CARE? ENGAGEMENT

Are they invested in the work, the team, and where the organization is going?

Known	Do they feel seen and known as a person?	☐ Yes ☐ Unsure ☐ No
Meaning	Do they understand why their work matters and who benefits from it?	☐ Yes ☐ Unsure ☐ No
Progress	Do they know how they are doing and what success looks like?	☐ Yes ☐ Unsure ☐ No
Growth	Can they see opportunities to learn, grow, and contribute in the future?	☐ Yes ☐ Unsure ☐ No

Overall Assessment

☐ Strong ☐ Mixed ☐ Concern

What stands out?

PERFORMANCE × FIT

Performance and fit are not the same thing. Use your assessment to consider the appropriate response.

	Strong Fit	Poor Fit
Strong Performance	INVEST Retain, stretch, develop, and create opportunities.	REPOSITION Explore whether another role would create better alignment.
Poor Performance	DEVELOP Provide clarity, coaching, support, and an opportunity to improve.	ACT Address the situation directly and make the necessary decision.

Where is this person today?

☐ Invest☐ Reposition☐ Develop☐ Act

DIAGNOSE THE REAL ISSUE

Based on your assessment, what is really going on? Select the primary issue. There may be more than one.

- ☐ **Clarity**They don't know what is expected, where they stand, or what needs to change.
- ☐ **Capability**They currently lack the skills, experience, or ability required.
- ☐ **Fit**The person and the role, culture, or future direction are not well matched.
- ☐ **Engagement**They have the ability but are not sufficiently invested.
- ☐ **Leadership**We have not provided the direction, feedback, development, accountability, or opportunity they need.
- ☐ **Other**

What do you now see more clearly about this situation?

CLARITY + COURAGE

Good performance management requires two things.

CLARITY: DO THEY KNOW?	COURAGE: HAVE YOU TOLD THEM?
Do they know what you expect? ☐ Yes ☐ Somewhat ☐ No	What needs to be made clearer? <div></div>
Do they know how you think they are performing? ☐ Yes ☐ Somewhat ☐ No	What conversation are you avoiding or delaying? <div></div>
Do they know your concerns? ☐ Yes ☐ Somewhat ☐ No	What is the next action you need to take? <div></div>
Do they know what needs to change or improve? ☐ Yes ☐ Somewhat ☐ No	By when? <div></div>