FREE PACK · INSIGHTS

# Performance problem diagnostic

Is it the person or the job? A checklist to complete before a performance conversation.

Complete this **before** you plan the conversation. Tick one box per line. Every "No" or "Not sure" is a possible cause to look at before you conclude it is the person.

**First: are there any legal implications to this performance issue?**

☐ Yes ☐ No ☐ Not sure

*If yes or not sure, speak to HR before the conversation, not after.*

| Knowledge and skill: Could they do it if their job depended on it? | Yes | No | Not sure |
|---|---|---|---|
| They have done this task to the required standard before. | | | |
| They do it often enough to stay in practice. | | | |
| They have been trained or shown how, with enough practice to get it right. | | | |
| A guide, checklist or worked example is there when they need it, and it is actually useful. | | | |
| Their performance is improving with experience rather than standing still. | | | |
| The task is within their capacity as the job is currently designed. | | | |
| **Standards: Do they know what good looks like, and does everyone agree?** | **Yes** | **No** | **Not sure** |
| They know exactly what they are expected to deliver. | | | |
| They know when it is expected, and what takes priority when demands clash. | | | |
| Everyone they answer to agrees on what is needed and when. | | | |
| The standard is written down somewhere they can see it. | | | |
| They know how their work on this will be judged. | | | |
| **Measurement: Can anyone, including them, see the gap?** | **Yes** | **No** | **Not sure** |
| This part of their work is actually measured or checked. | | | |
| The measure reflects the task itself, not something next to it. | | | |
| It looks at results, not just whether they followed a preferred method. | | | |
| It is objective: two managers looking at the same work would reach the same view. | | | |

| Feedback: Do they hear how they are doing, soon enough and specifically enough? | Yes | No | Not sure |
|---|---|---|---|
| They are told how they are doing on this. | | | |
| They hear soon enough to do something about it. | | | |
| They hear often enough, not just at review time. | | | |
| The feedback is specific enough that they could say what to do differently. | | | |
| It is about things they can control. | | | |
| It is accurate, and given in a way they can accept. | | | |
| **Conditions: Does the job let them do it?** | **Yes** | **No** | **Not sure** |
| The procedure for the task is clear and workable. | | | |
| There is enough time to do it properly alongside everything else. | | | |
| The tools, systems and equipment they need are available and working. | | | |
| The information they need is available and accurate. | | | |
| Interruptions and competing demands are at a manageable level. | | | |
| They have the authority the task needs. | | | |
| The job is realistically doable by one person, with support at peak times. | | | |
| **Incentives and consequences: What happens to them when they do it well, and when they don't?** | **Yes** | **No** | **Not sure** |
| They see the task as worthwhile. | | | |
| They believe they can do it. | | | |
| Doing it well leads to something they value: recognition, progression, interest, reward. | | | |
| They can see the link between doing it well and what follows. | | | |
| Doing it well is not quietly penalised (more work, duller work, friction with colleagues). | | | |
| Doing it badly is not quietly rewarded (someone else picks it up, they avoid a task they dislike). | | | |
| There is some satisfaction for them in the work itself. | | | |

## What it adds up to

In each area, add the “No” answers and half the “Not sure” answers, then divide by the number of questions in that area (four to seven). The areas with the highest share are your leading hypotheses – to test with the person, not to present as a verdict. Any area with at least one “No” (or two “Not sure”) is worth looking at.

| Area | Share | Rank |
|---|---|---|
| **Knowledge and skill** | | |
| **Standards** | | |
| **Measurement** | | |
| **Feedback** | | |
| **Conditions** | | |
| **Incentives and consequences** | | |

**The most likely causes, in order**

**What is within their control?**
*Skill, and the motivation side of incentives, sit partly with them. Consequences, and the rest, sit mainly with you or the organisation.*

**What do I need to fix first?**
*Fix the job before you discuss the person.*

**Who else needs to be talked to or involved?**
*System owners, other managers who set priorities, whoever allocates work, HR.*

**How I will open the conversation**
*Bring the diagnosis in as a question: “Here’s what I think may be getting in the way. What have I missed?”*

The test underneath it all: could they do it if their job depended on it? If yes, it is not a training problem. Checklist structure after Mager & Pipe’s performance analysis.

# Does any of this sound familiar?

The organisations we work with rarely come to us asking for a survey. They come with something that is costing them money, time or people. These are the ones we hear most often.

## MAKING MONEY

**"We hire well on paper and still get it wrong in the role."**
Personality, leadership and competency assessment matched to the job, so interviews test what matters and offers go to people who will perform. (FindingPotential)

**"Our best people leave and we only find out why afterwards."**
Exit intelligence in the leaver's final weeks: what was avoidable, who would come back, and what to change first. (LastOpinion)

**"Leaders get feedback once a year and nothing changes."**
Forward-looking 360 feedback that lands as development rather than judgement, with the actions built in. (FeedForward)

## SAVING MONEY

**"Too many new starters are gone inside a year."**
New-starter surveys at the points the first-year leak opens, so you act at three months instead of reading about it at exit. (OnBoarder)

**"References take weeks and tell us nothing."**
Automated referencing with questions that predict, most returned within 48 hours. (ReferenceExpert)

**"We run an engagement survey and the results sit in a drawer."**
Engagement reporting down to team level in plain English, with the three moves each team's own people chose. (WinningFormula)

## SOLVING PROBLEMS

**"The board wants evidence on culture, conduct and speaking up."**
A confidential always-on channel and a harassment-prevention audit that give you the evidence before a regulator asks for it. (SafeSpace)

**"We publish an inclusion statement and cannot show whether it is true."**
Inclusion measured at every stage from hire to exit, so you can see where the experience differs and act on it. (ED&I)

**"We have the data and cannot turn it into a decision."**
Twenty years of UK benchmark data and analysts who turn results into a board paper, not a dashboard. (Workforce intelligence)

## Who we are

great{with}talent is a UK workforce-intelligence consultancy, founded in 2003. We help organisations hire better, keep people longer, improve leadership, strengthen inclusion and reduce workplace risk, with a connected set of tools that turn employee data into clear, fast action across the whole employee lifecycle. Independent, GDPR-compliant and Cyber Essentials certified, hosted on Microsoft Azure.

**Not on the list?** It will not always be. If you are working on something you think we might be able to help with, drop us a note describing what you are trying to do and we will come back to you.

**On the list or not, let's talk.**

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