

Performance Analysis Worksheet

Complete the steps below to understand the nature of an individual performance issue. Alternatively, use Robert Mager's "Performance Analysis Flowchart and Worksheet," which is the source of this abbreviated version.

Step 1 - Define and agree on the problem.

(Describe the discrepancy and who is involved.)

- What is the performance discrepancy – the difference between what they should be doing and what they are actually doing?
- Whose performance is at issue?

Step 2 - Determine if it's worth solving.

(Some problems aren't worth the time and money to solve. So, make sure you aren't making an Everest out of a pitcher's mound.)

Step 3 - Can we apply fast fixes?

(Ever had a PC tech come to your office only to find the PC unplugged? Sometimes performance problems are solved with fast fixes.)

- Are expectations clear?
- Do they have what they need to do the job?
- Are they getting feedback on their performance?

Step 4 - Check the reactions to their actions.

- What happens when they do it right? (Are they ignored or punished?)
- What happens when they do it wrong? (Are they ignored or rewarded?)

Step 5 - Do they know how?

- Could they ever do it? If they never could do it right, then we have to look further. If they could, then the next question will help us.
- Is the skill used often? Skills that are rarely used get rusty. Providing more frequent practice might be the cure.

Step 6 - Are there more clues?

- Can the task be simplified?
- Are there other obstacles?
- Do they have potential to change? Can they learn it?

Step 7 - Select a solution and draft a plan.

- List all the potential solutions from above and estimate their costs.
- Describe the best solution. It must cost less than the cost of the problem.
- Draft an action plan.

Step 8 - Monitor results and follow up