

A scorecard is a simple document with surprising power. It helps:

1. Conceive of clear and accountable roles in your company.
2. Hold team members accountable.
3. Distribute your company's vision and values.
4. And, quite literally, get everyone "on the same page."

Best practices with scorecards:

- One of my business coaches repeated often: do not hire without first completing a scorecard. Scorecards are not a job ad, but rather a blueprint for how the role contributes to your company's goals. Be specific with that which is measurable. This will save you money.
- The scorecard document is simple, the *hard parts* are typically 1) determining measurables that lead to your broader company goals 2) Defining credible regular habits that correlate to the measurable outputs and 3) Ensuring capable people are in those roles and thriving.
- A typical manager will review scorecards every 90 days in 1:1 sessions. Team members and managers should make assessments and ratings independently before the meeting to see where they differ.



Company Name and Logo

Name: Jane Doe

Position/Title: Head of Marketing

Mission for the role: What is the broader purpose of their role in the company and to your customer base.

Personal focus: The personal career focus of the team member, what can they do to advance and improve their skill set, position, and ability to deliver value to the business.

Quarterly projects: This is where you discuss projects that are not day-to-day and sometimes not as easily measurable, ideally they would correlate to the goals below. Examples could be 1) Finish the new CRM install by May 2) Present CRM training by end of May 3) Add a new Friday newsletter by end of April.

Time Period: April 8th, 2024 - Aug 12, 2024

Measurable Responsibilities

	Metric	Rating 1 (low) to 5 (high)	Comments
Goals (Output)	<ul style="list-style-type: none">Measurable outcomes this person is responsible for. We try to keep it to 3 big metrics.The hard part about scorecards is choosing excellent goals and methodologies for measuring them. Be methodical and tweak often. The individual's goals should be closely tied to the company's overall goals.	Every 90 days (or whatever tempo you select) both team member and manager will rate the performance on each category before a scorecard review call. They should do this independently of each other and come to the call and compare notes.	An analysis of why the rating is made can go here. By both manager and team member doing independent ratings, you can get a sense for the difference in perspectives in any, and set the grounds for productive conversation to achieve common ground.
Habits (Input)	<ul style="list-style-type: none">This is typically the most detailed part of the scorecard, what are the weekly recurring habits that the team member should execute? Are they measurable? Do you have a strong hypothesis and consensus that they will lead to the goals listed above?		
Countervailing metrics	<ul style="list-style-type: none">These are metrics or principles that cannot be violated in order to achieve the above.		

Management	1. Who does this person report to. 2. Who do they manage and administer scorecards to.		

Rating Scale:

5 = Exceeding: Exceeds performance standards

4 = Meeting: Achieves performance standards

3 = Partially Meeting: Partially meets performance standards

2 = Not Meeting: Does not meet performance standards

1 = Unacceptable: Operating significantly below performance standards

			Rating	Comments
CORE VALUES				
Value A	Core values are a way to talk about difficult-to-measure approaches to work that set team culture and deliver your unique value proposition to the market. Great core values are often somewhat polarizing, help you to filter during the hiring process, and shouldn't be universal for all companies. An example would be "be honest" or "work hard." Since 90+% of companies would agree these are important for all team members, they're not as useful as values where excellent people could conceivably not share, more appropriate examples would be "relentlessly resourceful" or "seeks critical engagement of ideas." These values can be difficult to come up with, but once completed, set the tone for useful conversations during the Scorecard review sessions.			The same process happens here, where manager and team member rate the degree to which they embodied the core value in the past 90 days.
Value B				
Value C				
Value D				
Value E				

Rating Scale:

5 = Exemplifies the Core Value

4 = Mostly lives the Core Values

3 = Needs coaching to exemplify the Core Value

2 = Actively defies the Core Value

1 = Never lives the Core Value