



Action Guide

Step 3: Assess Workforce Talent

Now it's time to apply Step 3 by assessing employee performance and potential using the 9-Box Grid.

1. Place Employees on the 9-Box Grid

Download the “9-Box Grid template” so you can begin identifying potential successors. Place employees on the grid.

- Using your collected evidence, place each employee in the appropriate box based on their current performance (horizontal axis) and future potential (vertical axis).
- Discuss each placement with your leadership team or Succession Planning committee to ensure consistency and shared understanding.

2. Review the positions you prioritized in Step 1.

- For each position, list employees who have the skills, experience, and interest to potentially step into these roles in the future.
- Note any development needs or gaps that may exist for each employee.
- Collect performance evaluations, observed competencies, completed development activities, and examples of demonstrated leadership behaviors.
- Record any insights from supervisors or managers that can help assess both performance and potential.

Bonus

You could use this exercise to start informal development conversations with high-potential employees who are not yet ready for advancement.