

9-Box Talent Review Toolkit

Page 1 - team grid for a structured, evidence-led discussion.

REVIEW / MEETING

TEAM / FUNCTION

DATE

FACILITATOR

SCOPE + TIMEFRAME

SET THE FRAME BEFORE NAMES

Define performance using current-role outcomes and potential for a specified future scope and timeframe. Unknown evidence is not low potential. There is no forced distribution; use the grid to agree actions, not permanent labels.

Team placement snapshot

POTENTIAL FOR SPECIFIED FUTURE SCOPE / TIMEFRAME	High potential Low performance 	High potential Moderate performance 	High potential High performance
	Medium potential Low performance 	Medium potential Moderate performance 	Medium potential High performance
	Low potential Low performance 	Low potential Moderate performance 	Low potential High performance
	LOW	MODERATE	HIGH

PERFORMANCE IN CURRENT ROLE

Enter one name or employee ID per line. Keep placements provisional and evidence-linked.

FACILITATOR NOTE

Use neutral axis descriptions in the room. A person's aspirations and specialist path belong in the conversation, even when they do not point toward a larger role.

Individual Evidence Worksheet

Page 2 - separate current performance, future-scope potential, and employee aspirations.

PERSON NAME / ID

CURRENT ROLE / TEAM

REVIEW DATE

REVIEWER

TARGET SCOPE + TIME HORIZON

WRITE THE REASONING BEFORE THE BOX

Use observable examples and more than one perspective where possible. Potential is a hypothesis about a specified future scope and time horizon, not a measure of a person's worth or a prediction detached from evidence. Keep entries short enough to fit the boxes; save and check the text before printing.

Current performance

Results, role expectations, dates, and sources.

Potential for target scope

Learning or broader-scope examples, dates, and sources.

Aspirations and preferred growth

Keep aspiration separate from capability; specialist growth is valid.

Confidence and missing evidence

Mark one confidence level, then name the evidence gap and source to check.

☐ High ☐ Medium ☐ Low

Provisional placement

Mark one performance level and one potential level. Leave blank if the evidence is not ready.

PERFORMANCE ☐ Low ☐ Moderate ☐ High

POTENTIAL ☐ Low ☐ Medium ☐ High

WHAT WOULD CHANGE THIS VIEW?

Facilitator Checklist

Page 3 - practical prompts for preparation, calibration, disagreement, and record keeping.

SESSION / TEAM

DATE

FACILITATOR

ATTENDEES / EVIDENCE SOURCES

SCOPE + TIMEFRAME

KEEP THE SESSION EVIDENCE-LED

Ask what is known, who has seen the work, and what would change the view. Treat disagreement as useful signal; do not resolve uncertainty by pushing a person into a lower box.

Prepare before the session

- ☐ Performance criteria tie to current-role outcomes
- ☐ Potential criteria name a future scope and timeframe
- ☐ Review period and evidence sources are agreed
- ☐ Each manager brings a rationale and confidence level
- ☐ Names, IDs, and privacy boundaries are confirmed
- ☐ No quota or forced distribution is set

Calibrate in the room

- ☐ Start with evidence, then discuss the box
- ☐ Separate current performance from potential
- ☐ Ask who has seen the work and in what context
- ☐ Check recency, halo, similarity, and visibility bias
- ☐ Unknown evidence stays unknown, not low potential
- ☐ Record a provisional decision, gap, and owner

When people disagree

Use the prompts below to make the disagreement testable and keep the record useful.

DIFFERING VIEW / QUESTION

EVIDENCE TO CHECK

OWNER + BY WHEN

Session record

Capture decisions, evidence gaps, and follow-up owners while the discussion is fresh.

Development Action Planner

Page 4 - turn the placement into specific support, ownership, and a review point.

PERSON / TEAM

CURRENT PLACEMENT

TARGET SCOPE

PLAN DATE

OWNER FOR CONVERSATION

NEXT REVIEW / FOLLOW-UP

MAKE THE NEXT STEP OBSERVABLE

A box is a planning snapshot, not an identity. Choose an action that fits the person's aspirations and current context, name the support and owner, define what success looks like, and revisit when evidence changes. Keep each entry short enough to fit; save and check before printing.

Action / experiment	Support / exposure	Owner	Success measure	Follow-up

Conversation notes

What will the person hear, choose, or try? Keep the language specific and respectful.