

Performance Analysis Checklist

In order to determine the best solution for a performance problem or issue, it is necessary to individually assess each performance factor.

The following is a checklist designed to help determine where a performance issue may exist.

1. Answer the following questions based on your current knowledge and perception of the performance situation. Indicate your answers to the questions with a checkmark. NOTE: "Unkn" indicates unknown.
2. Once you have completed the checklist, review your answers to determine which factors need to be addressed to improve performance.

PERFORMANCE QUESTIONS	Yes	No	Unkn
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ABILITY AND EXPECTATIONS

Ability and Expectations

Are there goals or expectations set?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are there guidelines by which to achieve the goals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have the goals and expectation been discussed with the individual?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the individual understand the goals and expectations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the individual feel they can meet expectations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is individual's current ability compatible with expectations?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are expectations too high?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can expectations be adjusted?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can ability be increased through training or coaching?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MOTIVATION

Motivation / Desire

Does the individual have the motivation or desire to succeed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are there incentives in place that positively reinforce good performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the incentives worth the effort?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the individual see the benefits for achieving their goals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Rewards and Recognition

Are there proper rewards in place for good performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the rewards motivating enough to inspire peak performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are individuals being rewarded and recognized for their performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MINDSET

Mindset

- | | | | |
|--|--------------------------|--------------------------|--------------------------|
| Does the individual have self confidence or self esteem? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual see the goals as achievable? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Is the individual focused on achieving the goals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there issues distracting the individual? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual feel pressure and stress? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual have the proper mind set to achieve goals? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

KNOWLEGE

Knowledge and Skill

- | | | | |
|---|--------------------------|--------------------------|--------------------------|
| Does the individual have the information and expertise necessary to perform the job proficiently? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual have the skills and knowledge need to meet expectations? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual need additional training? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual have ample experience performing the tasks? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

PROCESS

Application

- | | | | |
|---|--------------------------|--------------------------|--------------------------|
| Is the individual applying the skills or knowledge correctly? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|--------------------------|

Efficiencies

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|---|--------------------------|--------------------------|--------------------------|
| Has the process been analyzed to ensure efficiencies? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there inefficiencies in the process? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are these inefficiencies being addressed? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Assessment

- | | | | |
|---|--------------------------|--------------------------|--------------------------|
| Are assessments being performed? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are the right people making the assessments on performance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are the correct factors being assessed? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are the root causes being assessed? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Evaluation / Feedback

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|--|--------------------------|--------------------------|--------------------------|
| Has the individual been given feedback on performance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Does the individual understand the feedback? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Has the individual created an action plan based on feedback? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Adjustments

- | | | | |
|---|--------------------------|--------------------------|--------------------------|
| Has the individual utilized the feedback to make adjustments? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are adjustments being made? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Has performance change in positive way? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there additional adjustment needed? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

RESOURCES

Tools, Supplies, or Equipment

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|--|--------------------------|--------------------------|--------------------------|
| Are the proper tools supplies and/or equipment available? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are the tools being utilized correctly and most efficiently? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there better tools available that may improve performance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

ENVIRONMENT AND CLIMATE

Environment

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|--|--------------------------|--------------------------|--------------------------|
| Are there external factors adversely affecting performance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Is the environment conducive for peak performance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there interventions that can take place to modify the environment? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Climate

- | | | | |
|--|--------------------------|--------------------------|--------------------------|
| Is the climate positive and supportive? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Are there elements of the climate can be controlled? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |