

## Critical Personnel Inventory

### WHO Does WHAT

The most critical decision a business leader makes is **WHO** does **WHAT**.

A majority of employee performance issues can be alleviated with basic processes in place. Expectations in writing, job descriptions, and scorecards, quarterly performance reviews, etc. If you don't have any of these in place, we recommend putting them in writing, even just a draft document to start the conversation with your team.

A people organization chart will provide the reporting and management structure you want in your organization. It is one of the most clarifying one-page documents in a business.

Step #1 is to draw out your current organization chart on page 2. If you need help with this, visit this website <https://www.gliffy.com/uses/org-chart-software/>

Step #2 On page 3: What would this org chart look like if your business grew by 50%, by 100% over the next two years.

Identifying the holes in the future organization should guide your recruiting strategy today.

## ***Current Organization Structure***

## ***Future Organization Structure***

### **Key Ideas:**

1. Who can replace a Key Leader if they leave?
2. Build a virtual bench, top prospects from your network.
3. Plan to develop your top talent for bigger future roles

**Step #3: Assessing the Key Leaders on your current team.**

**Once you fill in this chart, keep it extremely confidential**

The Assessment Table on page 5 has six columns.

Column 1: Name

Column 2: Current Performance, In their current role, rate the performance of this employee by the following scale.

- A = Consistently Exceeds Expectations
- B = Above Average
- C = Average
- D = Below Average
- F = Rarely Meets Minimum Expectations

Column 3: Future Potential. This is a very different question. If the company continues to grow, what is this employee's potential to lead and deliver results in a larger, more complex leadership role?

- A = Has the potential to be a General Manager or Future President
- B = Displays Great Leadership Potential
- C = Could Manage a Small Team
- D = Limited Capacity or Desire to Lead Others
- F = No Leadership Capacity

Column 4: If this employee won the lottery and turned in their 2-week notice how would you feel?

- Enter a minus sign (-) if it would wreck your plans for the future
- Enter a neutral (n) if you are not sure
- Enter a (+) if it would solve a problem for you if they left

Column 5: The Ultimate Question. If you knew what you know today about this employee on the day you hired them, Would you still make them an offer? If the answer to this question is 'NO' you have some tough leading to do.

Column 6: What should you do with this employee in 2021. Train and Develop high potential people. Help 'C's' get better. Move the wrong people on to other opportunities outside your company. The rest of your team needs you to do this.

## ***Critical Personnel Inventory***

**Assessment:** Current Team performance

### Scorecard for People #1: Assessment

Name	Current Performance (Rate A-F)	Future Potential (Rate A-F)	Lottery Win (Joy/Sorrow)	Ultimate ? (Yes/No)	Comments

## **Acceleration Plan**

Ideas for Accelerating the development of your current team

1. Fire yourself from a job or two, and promote/train/hire your replacement
  
2. Invest in your highest potential players
  - Leadership Training
  - Technical Skill Development
  - Mentoring (= Leading)
  
3. Small Business Xcelerator (Higher a full-time or part-time Administrator)
  
4. Build your virtual bench