Before determining how to handle a poor performer, use this checklist to ensure all the conditions necessary for optimal performance have been met. If there are any boxes that you cannot check as ‘completed’, schedule a meeting with your talent development team to discuss steps to resolve it.

1. **Expectations**
   - Do they know what's expected of them in their role?
     - Is there a clear description of their current position with which they are familiar?
     - Are the performance metrics clearly explained in writing?
     - Has the manager discussed the behavioral expectations of the role and how they should approach the work?

2. **Skillset**
   - Do they have the skills to do this job to the defined expectations?

3. **Job Design**
   - Have the behaviors necessary for success in this role been identified and communicated?
     - Risk tolerance
     - Accuracy and precision
     - Change readiness
     - People vs. task focus

4. **Self-Awareness**
   - Do they have access to data to help them understand their strengths, cautions, blind spots, and areas for growth?

5. **Support**
   - Has the manager provided individualized guidance to develop them, help them adapt, and improve performance?

6. **Resources**
   - Do they have the proper resources, materials and technology to complete the job as expected?

The results of this assessment will determine proper next steps, which could include training, coaching with development tools, job target development, re-fit, offboarding, and more.