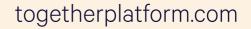# 9-Box Grid Template and Instructions

Create personalized development plans based on talent performance and potential

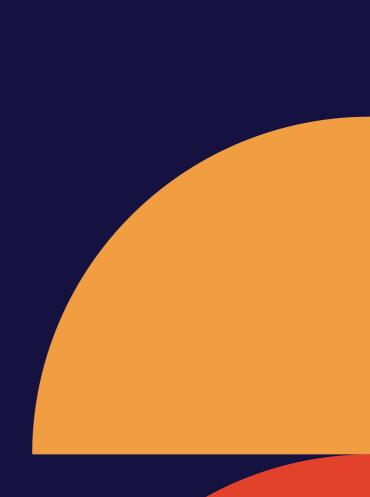together
an Absorb company

Introduction

Effective, forward-looking talent management is much easier with the right tools. The 9-box talent review framework helps you make evidence-based decisions about professional development initiatives, performance management, and succession planning.

Originally developed by consulting firm McKinsey when working with General Electric in the 1970s, the 9-box matrix has since been adapted for talent management and is a great tool to add to your belt.

In this ebook, you'll find the template, a step-by-step guide on how to use it, and a complete example to help you get started on your own 9-box talent review.

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9-Box Grid Template and Instructions

Template

Performance (X-Axis), Potential (Y-Axis)

	Low Performance	Medium Performance	High Performance
High Potential	[1,3]	[2,3]	[3,3]
Medium Potential	[1,2]	[2,2]	[3,2]
Low Potential	[1,1]	[2,1]	[3,1]

Instructions for Creating and Using the 9-Box Grid Effectively

Step 1
Define Performance Criteria

Establish Clear Performance Metrics

Define what constitutes low, medium, and high performance. This can include key performance indicators (KPIs), annual review scores, or other quantifiable metrics.

Gather Performance Data

Collect data from performance reviews, project outcomes, and other relevant sources.
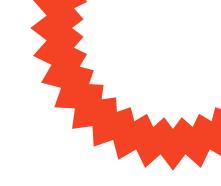
Step 2
Define Potential Criteria

Determine Potential Indicators

Identify characteristics that indicate potential, such as leadership skills, ability to learn quickly, adaptability, and willingness to take on new challenges.

Assess Potential

Use tools like assessments, feedback from managers, and employee self-assessments to evaluate potential.

Step 3

Populate the Grid

Identify Each employee's Performance and Potential

Using the criteria defined, place each employee in the appropriate box on the grid.

Example: An employee with high performance and medium potential would be placed in box [3,2].

Review placements

Ensure placements are consistent and fair. This may involve discussions with managers and HR.

Step 4

Analyze the Grid

Identify High-potential Employees

Focus on those in the top row (High Potential) for development and future leadership roles.

Address Low Performers

Consider improvement plans or reassignment for employees in the bottom left box (Low Performance / Low Potential).

Develop Tailored Strategies

Create specific development plans for employees based on their placement in the grid.

Implement Development Plans

01
High Potential / High Performance ([3,3])
Provide leadership development programs, stretch assignments, and mentoring.

02
High Potential / Medium Performance ([2,3])
Focus on performance improvement strategies, such as targeted training and coaching.

03
High Potential / Low Performance ([1,3])
Identify barriers to performance and provide support to overcome them.

04
Medium Potential / High Performance ([3,2])
Offer career advancement opportunities and skill development programs.

05
Medium Potential / Medium Performance ([2,2])
Provide regular feedback and professional development opportunities.

06
Medium Potential / Low Performance ([1,2])
Address performance issues and provide necessary training.

07
Low Potential / High Performance ([3,1])
Recognize their contributions and maintain current roles with some development support.

08
Low Potential / Medium Performance ([2,1])
Encourage consistent performance and provide necessary support.

09
Low Potential / Low Performance ([1,1])
Consider performance improvement plans, role reassignment, or exit strategies.

Step 6

Monitor and Review

Regular Reviews

Reassess the 9-box grid periodically (e.g., annually or bi-annually) to ensure it reflects current performance and potential.

Adjust strategies

Update development plans and strategies based on new data and changing organizational needs.

Step 7

Communicate Results

Provide Feedback

Share results with employees in a constructive manner, highlighting areas for development and growth opportunities.

Engage Employees

Involve employees in the creation of their development plans to ensure buy-in and commitment.

Example 9-Box Grid

	Low Performance	Medium Performance	High Performance
High Potential	Employee A	Employee B	Employee C
Medium Potential	Employee D	Employee E	Employee F
Low Potential	Employee G	Employee H	Employee I

Notes

Employee C (High Potential / High Performance) might be considered for fast-tracking into leadership roles.

Employee E (Medium Potential / Medium Performance) would benefit from professional development to enhance both performance and potential.

Employee G (Low Potential / Low Performance) may need an improvement plan or reassignment.

Using the 9-box grid effectively requires regular assessment, open communication, and tailored development strategies to help employees reach their full potential and contribute to the organization's success.

About Together

Together's mentoring software empowers enterprise organizations to drive performance through relationships. Whether you're running traditional 1:1 mentoring programs, peer or group mentoring programs, or just want to connect employees over a cup of coffee, Together matches employees at scale.

Together has consistently been granted the #1 mentorship software award for user experience by G2, the world's leading software review site.

Together Administrators Report...

94%
Improved Employee Skills

95%
A More Connected Company

100%
Improved Inclusion and Support

79%
Improved Retention

Some of our customers include

lightspeed

Kellogg's

randstad

Discovery

Teladoc HEALTH

NEW YORK LIFE FOUNDATION

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