

# Team Assessment Tool



**Positive  
Influencers**



**Switchers**

**Neutrals**



**Negative  
Detractors**

Focus time on Positive Influencers and add more to the team.  
Work to solve or remove Negative Detractors as soon as possible.

[See other side for instructions]



## Team Assessment Tool - Instructions

Every person on a team is critical to its success – both directly and indirectly. The wrong people on a team can pull it in the wrong direction and greatly contribute to lost productivity. If a team has too many people who are hindering success (Negative Detractors) then the project or department will almost certainly fail or not meet delivery and budget commitments.

This tool is to be used for assessing departments or projects by experienced managers who know the members of the team first hand and have observed how they are interacting.

### Guidelines

- As with all management tools, set a time limit and only use it as long as it is helping you. If it becomes painful or too slow – abandon it and find a more appropriate tool or method.
- Use this tool for ALL people working on the project or in a department (employees, outside consultants, people working for key vendors, etc).
- This tool should be treated as confidential and only used by management. It is not meant to be a formal employee measurement tool.

### Instructions

Place each team member's name (use only initials if possible) in one of the boxes based on the following criteria:

**Positive Influencers** – People who are delivering results AND driving the team in the right direction. They have a good attitude and work behaviors. They understand the real objectives of the department or project and are in line with management's direction.

**Negative Detractors** – People who are rarely or never delivering results. More importantly they are not bought into the real mission and/or have a very negative attitude. They lower the moral of the group. (Note – there can be any number of reasons for this. Lack of experience, needed training, the wrong job and personal issues can all be a factor). You will have to find the root cause and then take steps to correct this. In some cases a person may simply not be a good fit for your company. Don't transfer or promote a problem employee!

**Neutrals** – People who basically do their job and deliver no matter what. They don't really influence the team and they are not dramatically influenced by others. These are reliable team members to have, provided you have one or more Positive Influencers.

**Switchers** – These are the toughest to identify. These people go with the flow. If you have many Positive Influencers then they will deliver and move in the right direction. If you have more Negative Detractors they will become part of the negative influence.

After you have filled this out take a look at your team from a high level. If you have many Negative Detractors and Switchers take quick steps! It is always good to first focus on the Positive Influencers – encourage them, reward them, and try to get more on the team if possible. Then, Negative Detractors need to be fixed - FAST. Just one can de-rail an entire project if he or she is in a critical role. Other tools can be of help here such as the Development Plan, Improvement Plan, Roles and Responsibility Document, and Critical Skills Matrix.

