



The Job Scorecard™

Establish Clarity for Every Role



Introduction

Thank You for Downloading The Job Scorecard™!

Too many employees fall into mediocrity not because they lack talent, but because they don't have clear expectations.

When roles are poorly defined, **employees waste time on low-priority tasks, important responsibilities get overlooked, and leaders are left micromanaging instead of focusing on strategy.**

The Job Scorecard™ is designed to change that.

By downloading this scorecard, you're taking a critical step toward unlocking your team's full potential.

If you need help tailoring this tool to your unique needs, don't hesitate to reach out. Here at The Metiss Group, we have decades of experience crafting tailor-made job scorecards for our clients, and we've seen firsthand how clear expectations can transform a team.

Here's to clarity and results,




The Metiss Group™

How To Use The Job Scorecard™



We strongly recommend working with one of our behavior experts to create The Job Scorecard™ for each role. Otherwise, you risk setting unrealistic expectations or not properly prioritizing categories, which will put you right back where you started.

But in the absence of working with a trusted advisor, here's what you can do:

- ✓ **Meet with Key Stakeholders:** This will allow everyone to contribute to what success will really look like
- ✓ **Define Success Factors:** List the outcomes a person in this role is expected to achieve.
- ✓ **Break Into Categories and Prioritize:** Sort the success factors into 3-5 categories. Then rank them in order of priority, and dedicate a percent of time the employee should spend in each category.



The Job Scorecard™ Sample



Future 10X Company - Executive Assistant

Accountability	Priority	Percent	Success Factors
President Support	1	40%	
Manage Cyndi's calendar (gatekeeper)			Additional time supporting President was experienced
Manage Cyndi's email			President was able to accomplish Rocks
Prioritize Cyndi's time			No avoidable travel surprises were experienced
Coordinate monthly sales Zoom			Increased President productivity was experienced
Prepare PowerPoint presentations			Inbox zero end-of-week was experienced
Support with community outreach			Positive charity feedback was experienced
Book travel			Positive board feedback was experienced
Assist in sourcing and screening select positions			
Attend one-on-one meetings with President			
Drive huddle time			
Team Future 10X Company	2	10%	
Create newsletter			Reviews were completed on time
Edit marketing materials			Newsletter was created timely and regularly
LMA team			"Approachability" was demonstrated
Conduct 360 reviews			Leader feedback form scores were consistently 3+
Back up direct reports			Attendance at team events was demonstrated
Participate in company events			Core values were demonstrated
Pursue personal/professional development			Promotability of direct reports was demonstrated
Demonstrate core values			Personal development was accomplished
Assist team members (trusted advisor)			Meetings were attended on time, prepared, and engaged
Participate in community events			
Mentor and coach team			
Special Projects (Events)	3	25%	
Manage special projects (new office building)			Projects plans were met
Assist planning and execution of events (schedule, assist sales - 1 per quarter)			Project plans were in place
Approve event purchases			No avoidable surprises were experienced
Update team on project status			Positive event feedback was received
			Project budget was met
HR Activities	4	15%	
On board new employees (office and manufacturing)			Reduced time in HR was accomplished
Monitor HR email			New employees were on boarded and oriented successfully
Liaise with Insperity			Onboarding checklist was completed for each new hire
Process HR paperwork (performance reviews)			New hires demonstrated core values awareness
Coach supervisors on performance management tools			Quarterly performance management scores were completed and documented
Assist in hiring process			No legitimate regulatory issues were experienced
Conduct office new hire company orientation			
Maintain employee files			
Triage employee relations			
Office Management	5	10%	
Coordinate team			EOS meetings were well documented
Share information (hub)			Ninety was updated real time
Document L10 meetings (3) and EOS meetings			Positive team feedback was received
Act as SME Ninety EOS system			
Act as Google SME			
Support office product challenges			
Coordinate Monday company-wide huddles			

The Performance Acceleration Tracker™ Sample



Sample - Plant Controller



Accountability	Priority	Percent	Success Factors	On track?			
Analyses	1	30%		Yes	Inc	No	N/A
Report operational variances			Insightful and timely analyses were provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contribute insights and recommendations			Analyses drove positive actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare LE (forecasts) monthly							
Accounting Activities	2	40%					
Close books monthly			Books were closed as scheduled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare monthly division financials			Data and reports were timely and accurate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Synthesize department forecasts into annual budgets			Minimal variance in physical inventory was experienced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare capital requests			No avoidable surprises in physical inventory were experienced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan physical inventory			All variances were reconciled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify and reconcile physical inventory			Positive cash projections were achieved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set standard costs (labor, material)			Days of sale in A/R was improved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide information to corporate as needed			Tax returns were filed on time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			Differences between standard and actual costs were managed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team ABC Company	3	15%					
Collaborate with division department heads			Positive corporate feedback was received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide counsel to Plant GM			Meetings were attended on time, prepared and engaged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Liaise with IT			Personal and professional development plans were defined and executed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leverage system for efficiencies			Continuous improvement activities were observed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participate in plant-wide hiring process			Positive GM feedback was received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participate in regular GM staff meetings							
Participate in monthly plant review meetings							
Talent Management	4	5%					
Conduct performance reviews			No avoidable turnover of "A" players was experienced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participate in annual People Day			Performance reviews were timely and thorough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentor and coach direct reports			Direct reports' development goals were in place and met	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			One-on-one meetings with direct reports were held regularly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oversight	5	10%					
Oversee physical inventory			No surprises in year-end audit variances were experienced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oversee A/P and A/R			Appropriate action relative to auditor recommendations was taken	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oversee cycle counting			Positive auditor feedback was received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oversee Receptionist			Transactions were processed in a timely, responsive manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oversee Accounting Generalist			Appropriate internal controls were in place and monitored	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Next Steps

Now that you understand how The Job Scorecard™ can help you establish clarity for every role, the next step is to schedule a call with us.

In this call, one of our behavior experts will listen to your workplace challenges and help you plan the next step.

[Schedule your call today.](#)