FlexOps

FLEXOPS RESOURCE · TEAM

Team performance matrix for agencies: skill, will, fit and ambition

By Ross Brown, FlexOps

A team performance matrix gives you 1 score per person and a single view of the whole team. I score each person on 4 things, which are skill, will, fit and ambition, and then plot them against how well they're delivering in their role, so you can see who to stretch, who to support and who you need to have an honest conversation with.

Read this online at flexops.co/resources/team-performance-matrix

When an agency needs this

This is the parallel of the client tracker, for the people on your team. If you're really struggling to understand how your team is performing, it's probably because you don't have measures in place, or you do have them and they're not being followed.

Without something like this, you're guessing about how people are doing. You're also making appraisals and reviews incredibly difficult for yourself, and you're making the employee's experience of the business much more difficult than it needs to be. They don't have clarity from you on how they're doing, and you don't have clarity for yourself either, and I think both of those need to change.

It's a way of tracking performance that captures more than KPIs, so it takes in the whole host of things that contribute to someone's impact. The key thing is often defining what you want to measure people on in the first place, and once you've decided on that, you can put it into something like this.

When there's no structure, there are 4 kinds of people who tend to get missed.

- **Great people**, who end up struggling without anyone noticing, because nobody checks in properly.
- **Underperformers**, who slip under the radar because there's no clear benchmark.
- **Disruptive characters**, who go unchecked because the owner is too busy firefighting to notice the damage.

- **Hidden leaders**, the ones who could step up and take real ownership, who don't get recognised.

The 2 things you're measuring

There are 2 layers to measuring a person, and I think you need both, because either one on its own gives you a misleading picture.

The first is the role, which is what they're expected to deliver. Every role is defined by 3 to 5 core responsibilities, and each responsibility has 2 or 3 KPIs or objectives that the person is measured against.

The second is the person, which is how well suited and aligned they are. I look at that through 4 lenses.

Lens	The question it answers	What good looks like	Weight
Skill	Can they do the job to the standard required?	They deliver the core responsibilities to a high standard with little oversight.	50%
Fit	How well do they reflect the values and principles of the business?	They consistently work in line with your stated values and set the tone for others.	30%
Will	Do they show up with the right attitude, energy and ownership?	They're proactive and reliable, they solve problems before escalating, and they help others.	10%
Ambition	What do they want, and is it aligned with where the agency is going?	They're clear about how they want to grow, they take on more and they invest in their own development.	10%

Skill carries the most weight because it's what clients pay for, and will and ambition tell you more about where someone is heading. You can adjust the weightings to suit your agency.

Fit is the one most agencies skip, and I think it's such an important factor. You can have an incredibly skilled person who, on paper, does their job exceptionally well, but who is a poor fit with clients, with their peers or with leadership. They might not really want to be there, perhaps because they're unhappy with the business or with the role, or they might be a very different type of person to the one you want in your business. That is going to weigh heavily on the people around them, and that's a problem.

Step 1: define the role

Before you can judge whether someone is doing well, you have to be explicit about what the role is for. Write down the 3 to 5 core responsibilities and attach 2 or 3 KPIs or objectives to each. I'd keep the KPIs mostly to inputs the person controls, such as the number of reviews completed,

with a couple of outputs tied to how the business performs, such as account retention.

Here's a worked example for an account manager.

Core responsibility	KPIs or objectives	Target
Own client relationships and retention	Client retention rate, and a satisfaction score	More than 90% retained, satisfaction of 8 or above
Deliver work on time and on brief	% of deliverables on time, and revisions per project	More than 95% on time, fewer than 2 revisions
Grow accounts	Upsell and cross-sell revenue per account	Account value up 15% a year
Keep the team informed and unblocked	Weekly status updates logged, and escalations handled before they reach the owner	Every update logged, escalations going down

Step 2: score the person

Score each lens out of 5, where 1 is well below expectation, 3 meets expectation and 5 consistently exceeds it. For the best results I'd have the person's manager and 1 peer score independently and then agree a final number, and I'd score on evidence and not on gut feel.

To turn the 4 scores into 1 score out of 100, multiply skill by 0.5, will by 0.1, fit by 0.3 and ambition by 0.1, add them together and multiply by 20.

As an example, someone with skill 4, will 3, fit 5 and ambition 3 comes out at 2.0 + 0.3 + 1.5 + 0.3 = 4.1, which is 82 out of 100.

I'd keep a single sheet with a row per person, showing their role, the 4 scores, the overall score and where they sit on the matrix. Re-score every quarter and watch how people move.

Step 3: plot the team on the matrix

The matrix turns the numbers into a decision. Across the top is whether they're delivering against the role's responsibilities and KPIs. Down the side is how well they reflect your values, and how much drive and potential they show.

Fit and ambition	Delivery below the role	Delivery on track	Delivery exceeding
High	Raw talent	Trusted performer	Star
Solid	Needs development	Trusted performer	Star
Low	At risk	Needs development	Needs development

What I'd do with each group:

- **Star.** High delivery with strong fit and ambition. These are your future leaders, so stretch them, keep them and give them a growth path before they ask for one.
- **Trusted performer.** Reliable delivery and solid fit. They're the backbone of the agency, so reward them, keep them engaged and don't take them for granted.
- **Raw talent.** They're not delivering yet, but the fit is great and they're hungry. Coach them, mentor them and give them time, because these often become your best people.
- **Needs development.** There's a gap in either delivery or fit. Clarify expectations, put targeted support in place and set a review date. If the delivery is high and the fit is low, I'd have a conversation about values and keep an eye on the behaviour.
- **At risk.** Low delivery and low fit. I'd have the honest conversation early, with a clear improvement plan and a deadline, or a managed exit. There's a guide to having that conversation if you've been putting it off.

How to keep it going

A tracker only works if it's part of how you run the team. This is a rhythm that works well for agencies.

How often	What	What happens
Weekly	Pulse	A quick check on inputs, KPIs and any blockers, in 5 to 10 minutes.
Monthly	1:1	Progress against objectives, wellbeing and 1 thing to improve.
Quarterly	Review and development plan	Re-score the 4 lenses, update the matrix and agree a development plan.
Annually	Formal review	Where they're heading, the role and pay conversation, and goals for the year.

Where owners get this wrong

This goes wrong when you measure the wrong things, or when you have the right things but don't follow through on doing it. It's similar to the client tracker, in that it becomes fairly useless if you don't put the data in to a high standard.

It can also go wrong in how it's introduced. I'd be transparent with the team that this is about growth and clarity and has nothing to do with surveillance. Share the criteria openly so people know what good looks like, treat mistakes as learning, and pair every score with a conversation.

Questions owners ask about this

What is a skill will matrix?

It's a grid that plots each person on how capable they are and how motivated they are, so you can decide how to manage them. I add fit and ambition to it for agencies, because how well someone reflects your values and where they want to go matter a lot in a small team.

How often should I review my team's performance?

I'd re-score everyone once a quarter, with a monthly 1:1 and a short weekly check in between. The formal review, including pay, happens once a year.

Who should do the scoring?

Ideally the person's manager and 1 peer, scoring independently and then agreeing a final number. In a small agency that might be you and 1 other senior person.

What do I do with someone who scores low?

It depends where the gap is. If they fit well and they're hungry, I'd give them coaching and time. If delivery and fit are both low, I'd have an honest conversation soon, with a plan and a date.

If you'd like a hand with it

This is the kind of structure I build with agency owners, so if you'd like to talk through how it would work for your team, drop me a note or, by all means, book a call. The Agency Health Check will also tell you whether the team is the area to look at first.