Dual Dash

FILLABLE WORKSHEETS

Strike Zone Worksheets

Put every role's most important numbers in one view, make expectations clear, and build the coaching rhythm that develops your people and your bench.

9 worksheets

Fill on screen or print



INSIDE

Built on the Dual Dash performance system

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Where you stand across the performance loop

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KPIs, Performance Drivers and Role Skills

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Before, during and after every 1:1

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Set the cadence, catch issues early

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Pilot, launch and make it a habit

Performance System Self-Assessment

Check each practice that's true today. Date each column when you take it and come back every 90 days. Then rank the area to work on first.

	DATE TAKEN			RANK
1. Scorecards				
Every role has a Scorecard with the KPIs that define success	☐	☐	☐	
Each KPI has Does Not Meet, Meets and Exceeds benchmarks	☐	☐	☐	
Each KPI has a data source and an update frequency	☐	☐	☐	
Employees can see their own Scorecard any time	☐	☐	☐	
2. Success Drivers				
Each role has defined Performance Drivers	☐	☐	☐	
Each role has Role Skills, assessed from Not Trained to Expert	☐	☐	☐	
Managers give feedback on Performance Drivers in every 1:1	☐	☐	☐	
3. 1:1 Meetings				
Every employee has a recurring 1:1, weekly or every other week	☐	☐	☐	
1:1s cover KPIs, goals, action items and Growth Plan progress	☐	☐	☐	
Sentiment and stress are shared and talked about	☐	☐	☐	
Every 1:1 ends with action items someone owns	☐	☐	☐	
4. Work Plans + Recognition				
Goals and tasks have an owner, a due date and a status	☐	☐	☐	
Wins are recognized with STARS as they happen, not at month end	☐	☐	☐	
5. Growth Plans + Bench				
Every employee has one active Growth Plan	☐	☐	☐	
Growth Plans start with a Career Direction	☐	☐	☐	
Growth Plans are reviewed in 1:1s, not filled out and forgotten	☐	☐	☐	
Every key leadership seat has a named successor in development	☐	☐	☐	
6. Reviews + Listening				
Performance Reviews are built from the year's data, not memory	☐	☐	☐	
We survey people at onboarding, for engagement and at exit	☐	☐	☐	
Total checked (out of 19)				

Reading your score: the sections with the fewest checks are your gaps. Performance moves in a loop: Scorecards, Meetings, Work Plans, Recognition, Growth and Reviews. A gap early in the loop weakens everything after it, so fix the earliest one first.

WORKSHEET 2

IN DUAL DASH: SUCCESS DRIVER LIBRARY

Define Success Drivers for a Role

Strong performance comes from results, behaviors and capability together. Define all three for one role, so everyone knows what success looks like.

ROLE

DEPARTMENT

KPIs

What you produced

The results tied to the role. Pick 3–7.

Ask: What outcomes matter most? Are we hitting our targets?

1

2

3

4

5

6

7

Performance Drivers

How you showed up

The behaviors and habits behind the results.

e.g. communication, accountability, follow-through, preparation

1

2

3

4

5

Role Skills

What you can execute

The capabilities the job requires.

e.g. tools, product knowledge, processes, compliance

1

2

3

4

5

6

Next: turn the KPIs into a Scorecard (Worksheet 3) and define each driver and skill (Worksheet 4). In Dual Dash these become the role's Success Driver library, which Growth Plans pull from.

IN DUAL DASH: SCORECARDS

Build the Role Scorecard

You can't improve what you can't see. Put the role's KPIs in one view with clear benchmarks, so everyone knows where the line is and where they stand.

ROLE

SCORECARD OWNER

KPI	Type	Frequency	Data source	Does Not Meet	Meets	Exceeds	Outcome or leading?

Type: $ · % · # · Time. **Frequency:** Daily, Weekly, Monthly, Quarterly or Annually. **Does Not Meet** is the minimum acceptable level. **Outcome or leading?** Mark outcome KPIs (Cars Sold), and for each leading KPI note which outcome it drives, so managers can coach the gap.

When benchmarks vary by level

Fair doesn't always mean the same number. Some KPIs can be benchmarked by level so expectations fit where someone is in the role.

EXAMPLE: UNITS SOLD, MONTHLY TARGET BY LEVEL

6	10	14	18
Beginner	Intermediate	Advanced	Expert

Use the same levels for this role's Role Skills and Growth Plans.

Before every 1:1, look for

- **Red**
  KPIs below Does Not Meet: coach the why
- **Trending down**
  Catch it before month end
- **Exceeding**
  Recognize it. Send a STAR from the KPI

Add notes to a KPI as things happen, so you coach from facts, not memory.

Performance Drivers & Role Skills

KPIs show what happened. Performance Drivers explain how it happened, and Role Skills show who can actually do the work. Define both, then map your team.

Define the Performance Drivers for this role

Performance Driver	What it looks like when it's strong	What it looks like when it's missing

Role Skills map

Rate each person: NT = Not Trained · T = Trained · A = Advanced · E = Expert

Team member						

Read the map

A column full of NT or T is a training gap for the whole team. A row with several E's is a mentor who can teach others. A gap that keeps showing up in someone's results is a strong candidate for their next Growth Plan.

WORKSHEET 5

IN DUAL DASH: MEETINGS

The 1:1 Meeting Plan

The 1:1 is where everything connects: KPIs, goals, action items and Growth Plans. Use this plan before, during and after each one, so every 1:1 picks up where the last one left off.

EMPLOYEE | MANAGER | DATE

BEFORE · Build the agenda together

- ☐ KPIs from the Scorecard
- ☐ Goals
- ☐ Action items from last time
- ☐ Growth Plan progress
- ☐ Custom topics
- ☐ Nothing to Add

AGENDA TOPICS

DURING · Coach the why behind the number

RED OR TRENDING DOWN

EXCEEDING: RECOGNIZE IT

Ask: What's driving this result? What's getting in the way? What needs to change?

GROWTH PLAN: WHAT ARE WE WORKING ON, WHAT PROGRESS DID WE MAKE, WHAT'S NEXT?

Reflection inputs PERFORMANCE DRIVERS FEEDBACK | SENTIMENT | STRESS

If stress is higher than sentiment, dig deeper: "What's causing the pressure? Is anything in my control to help with?"

AFTER · Follow through

- ☐ OWNER / DUE
- ☐ OWNER / DUE
- ☐ OWNER / DUE

STAR TO SEND: | MOVE TO NEXT 1:1:

Next time, start with: "Here's what we said we'd do. How did it go?"

Growth Plan

A shared plan for development: what the employee is working on, what success looks like, and what they need to get there. One active plan at a time, reviewed in every 1:1.

EMPLOYEE

CURRENT ROLE

1. Career Direction

Which statement best describes where you're focused right now?

- ☐ I'm new to this role and focused on becoming confident and consistent in it.
- ☐ I'm established in my role and want to get better at specific skills or behaviors.
- ☐ I'm performing well in my role and thinking about long-term growth opportunities.
- ☐ I'm happy in my current role and want to continue doing great work here.

IF GROWTH OPPORTUNITIES: FUTURE ROLE

2. The plan

PLAN TITLE

STATUS %

FOCUS ON A ☐ Performance Driver ☐ Technical Skill

WHICH ONE

LEVEL

WHAT WILL SUCCESS LOOK LIKE ONCE THIS PLAN IS ACHIEVED?

Not "get better at communication," but "communicate priorities clearly with my team and consistently follow up on commitments."

DEVELOPMENT METHODS ☐ Coaching ☐ Mentoring ☐ Shadowing ☐ Training ☐ On-the-job Practice

3. Growth Outcomes

The concrete steps that get you there

- ☐
- ☐
- ☐
- ☐

4. Support needed from my manager

5. 1:1 check-ins

Date	Progress since last 1:1	What's next

Bench Plan

When a leadership seat opens, don't go looking for someone from another group. Know who's ready now, who's next, and what each person is working on to get there.

Key seat	Current leader	Ready now	Ready in 12 months	Ready in 2+ years	Gap to close (driver or skill)
General Manager					
General Sales Mgr					
Service Manager					
Parts Manager					
F&I Director					
Sales Manager					

For each candidate, check the evidence

When someone asks "why them?", answer with receipts, not a hunch.

Candidate	Target seat	Hits KPIs	Strong drivers	Skills Adv+	Growth Plan	Next step
		☐	☐	☐	☐	
		☐	☐	☐	☐	
		☐	☐	☐	☐	
		☐	☐	☐	☐	
		☐	☐	☐	☐	

Turning the bench into a plan

Each candidate who's ready in 12 months or more should have an active Growth Plan with the Career Direction *performing well and thinking about long-term growth* and the target seat as their future role. Their plan then pulls the Performance Drivers and Role Skills for that seat, and you track progress in every 1:1.

Coaching Rhythm & Coaching Targets

Coaching can't wait for the month-end numbers. Set a rhythm, then watch for the five signals that tell you who needs attention before it becomes a problem.

Set the rhythm

Touchpoint	Recommended	Who	Day / time
1:1s	Weekly or every other week		
Scorecard review	Before every 1:1		
Growth Plan check-in	Inside every 1:1		
Team huddle / group meeting	Weekly		
Monthly Operating Review	Monthly		
Performance Review	Each review cycle		

Coaching Targets: who needs attention this week?

Team member	Missed 1:1s	Slipping KPIs	Rising stress	Sentiment down	No praise	What I'll do
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	

Two or more checks on one person is a conversation to have this week, not at month end. **No recent praise** is the easiest one to fix today: send a STAR.

WORKSHEET 9

IN DUAL DASH: IMPLEMENTATION

Rollout Plan

Performance isn't a campaign. It's a cadence. Start with one team where there's buy-in, get the loop running, then expand.

1 Choose a pilot team

One department or store with a manager who wants it to work.

PILOT TEAM	CHAMPION

2 Scorecard Design

Pick each role's KPIs, link outcomes to the leading KPIs that drive them, and set benchmarks.

ROLES	DONE BY

3 Success Drivers

Define the Performance Drivers and Role Skills for each role in the pilot.

DRIVERS + SKILLS OWNER	DONE BY

4 Start recurring 1:1s

Every manager sets up a weekly or every-other-week 1:1 with each person.

MANAGERS TRAINED BY	FIRST 1:1S BY

5 Launch Growth Plans

Every employee picks a Career Direction and creates one active plan.

PLANS CREATED BY	BENCH SEATS COVERED

6 Embed the rhythm

Add Scorecards to huddles and Monthly Operating Reviews. Recognize with STARS.

MEETINGS IT'S ADDED TO	FIRST REVIEW DATE

Avoid the pitfalls

- ☐ Don't overload with metrics. Pick what matters most.
- ☐ Don't skip the drivers. How work gets done is half of it.
- ☐ Don't launch and leave. It's a habit, not a handoff.
- ☐ Don't use it as a weapon. It's for coaching, not gotchas.

START TODAY

One role. One Scorecard. One 1:1.

Want to run the whole loop in one place? See Dual Dash at dualdash.com/demo