

The Nine Box.

An instrument: potential against performance, nine boxes, one page — the fifteen-minute talent review that replaces weeks of the other kind. With the template.

An instrument for people.

The nine box asks two questions about every person on a team — how are they performing in the role they have, and how much potential do they have for the role after it — and places them on a grid. It is the instrument that joins two other things on this shelf: the [Competency Model](#), which is how potential is read, and [Objectives and Key Results](#), which is how performance is scored.

VERSION	DATE	AUTHORITY	NOTES
1.1	October 2026	Juan Carlos González II	First public edition, rebuilt from the 2026 review deck as a Juan.co instrument; the two axes tied to the Competency Model and to key results; the fifteen-minute review written down; the template
1.0	2017	Juan Carlos González II	First used as Senior Director of Customer Success at a Vista Equity portfolio company, to re-measure whether each person was in the right role and was being challenged and rewarded through their growth; redrawn in 2026 for a portfolio talent review

HOW TO USE THIS INSTRUMENT

Read page 4 once, for what a review is for. Page 5 is the two axes — read it before you score anyone, because the second axis is the one everyone gets wrong. Pages 6–7 are the grid and what each box asks of you; page 8 is where the money goes. Page 9 is the meeting, and page 10 is the template and the checklist. Open the workbook beside page 9.

TERMS OF USE

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Fifteen minutes.

In 2017 I ran a Customer Success organization inside a private-equity portfolio company, and I inherited the annual review. Weeks of forms, self-assessments, calibration meetings and ratings on a five-point scale — and at the end of it, no answer to the only three questions I actually had about anyone.

Is this person in the right role? Are they being challenged? Are they being rewarded — in growth and in money — in proportion to what they are doing and what they could do? The review process did not ask those questions. It asked whether last year's goals were met, which the key results already said, and whether the person "exceeded expectations," which nobody could define. It was painstaking, and it was irrelevant to the decisions I had to make: who to stretch, who to move, who to keep exactly where they were and pay properly for it, and who to have a hard conversation with before the quarter ended.

So I used the nine box instead. Two scores per person — performance in the role they have, potential for the role after it — and a grid with nine cells, each of which carries a reading and a move. With the scores in hand I could review an entire team in fifteen minutes, with the team's managers in the room, and leave with one action per person. The grid did not replace the conversation with each person; it replaced the weeks of paperwork that had been standing in for it. Nine years on it is still the first thing I draw when I take over a team, and the first thing I ask for when I look at a company.

QUESTION ONE

Right role?

A person with high potential and low performance is not a bad employee; they are usually in the wrong seat. The grid separates the two readings that an annual review collapses into one score.

QUESTION TWO

Challenged?

High performance with room to grow wants a stretch. High performance at the end of its stretch wants to be left alone and respected. The grid tells them apart; a rating of "exceeds" does not.

QUESTION THREE

Rewarded?

Growth in responsibility and in pay should follow the box, predictably, so that a person can see their own path a quarter ahead. The grid is where that predictability comes from.

Two axes.

Everything the instrument says depends on scoring the two axes as two different things. Performance is about the role the person has. Potential is about the role they do not have yet.

PERFORMANCE · THE HORIZONTAL AXIS

Results against the role

What the person delivered this quarter against what the role was asked to deliver — the key results they own, scored the way the OKR model scores them.

Low · below the bar

Committed results missed; the basic requirement of the role not met.

Medium · at the bar

Committed results met; the role done as described.

High · past the bar

Committed results met and aspirational ones reached — seventy percent of a stretch counts.

POTENTIAL · THE VERTICAL AXIS

Competencies against the next role

The three unteachable behavioural competencies — strategic thinking, building effective relationships, bias for action — read against the demands of the role *after* this one, in the weights that role needs.

Little · none

The competencies the next role needs are not evident, or the person does not want the next role. Both are legitimate; neither is a performance judgement.

Average · some

Some of what the next role needs, visible in the work; growth is possible with development.

Lots

The next role's competencies are already visible in this one. The person is doing a bigger job than they hold.

Three rules keep the axes honest. **Potential is not performance plus enthusiasm.** A high performer is not automatically high potential, and the grid has a box — the trusted professional — precisely for the one who is not and should not be made to pretend. **Potential is relative to a named role.** A Customer Success Manager with high strategic thinking has potential for a leadership role; a Sales Executive with brilliant relationships and little strategic appetite has potential for a bigger quota, not for management. Score against the role you would actually move them into. **Score performance from the numbers, potential from the behaviours.** The first axis comes from the key results; the second comes from the Competency Model's matrices and the interview questions in it, applied to someone you already employ.

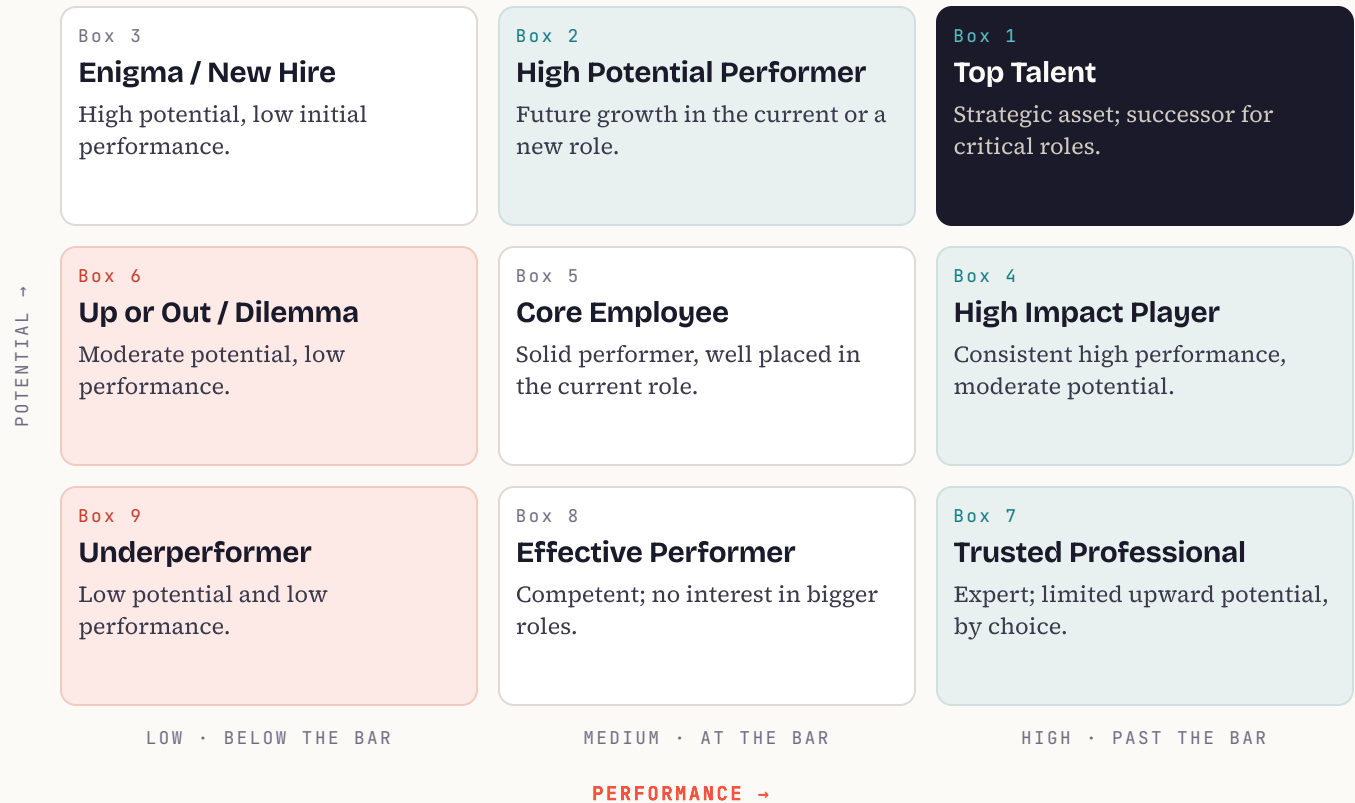
WHY THREE LEVELS AND NOT FIVE

Five levels invite the argument about whether someone is a three or a four. Three levels invite the argument about whether they are at the bar or past it, which is the argument worth having, because it ends in a decision. The instrument is coarse on purpose; the conversation is where the precision goes.

II • THE GRID

Nine boxes.

Performance across, potential up. Box 1 is the top right; box 9 is the bottom left; the diagonal from 7 to 3 is where most of the hard thinking happens.



Read the grid as three bands. The **top right** — boxes 1, 2 and 4 — is where the next leaders are, and where development money goes first. The **diagonal** — 7, 5 and 3 — is the team itself: the experts who are exactly where they should be, the core who do the work, and the new or misplaced who have not shown what they can do yet. The **bottom left** — 6, 8 and 9 — is where the conversations are overdue, and the instrument's whole value is that it makes them visible before the quarter ends rather than at the end of the year.

II • THE GRID

What each box asks of you.

A placement is not a verdict; it is an instruction to the manager. Every box carries a move, and the move is the point of the review.



Box 3 and box 6 share a move — the crucial conversation — but not a diagnosis: box 3 is often a hire too new to read, and the conversation is "what do you need?"; box 6 is a person who has been in the seat long enough, and the conversation is "which seat?". Box 7 is the box most organizations mishandle, by promoting the expert into a manager's job they never wanted and losing both an expert and a manager.

II • THE GRID

Invest, selectively invest, divest.

The grid is also a budget. Development time, stretch assignments, promotions and pay follow the boxes — and the pattern is a diagonal, not a ladder.

BOXES 1, 2, 4

Invest

Strategic initiatives, special development, named successors, the stretch key results. Pay for the year — these are the people whose compensation should be ahead of the market before they ask, because the market will ask for them first.

BOXES 3, 5, 7

Selectively invest

Training and development in the current role for the core; respect, retention and expert pay for the trusted professional; a decision, not a budget, for the enigma. This is most of the team, and it is where "appropriately rewarded" is won or lost.

BOXES 6, 8, 9

Divest — of the problem, not necessarily the person

Box 8 is kept at the basic requirement and not invested in beyond it. Boxes 6 and 9 get the conversation, the plan and the clock: forty-five to sixty days to a visible trend, then a reassignment or an exit. Investing development money here is the commonest way a team's budget disappears.

Growth should be predictable. A person in box 5 who moves to box 4 should see it in their responsibilities that quarter and in their pay that year, and should have been able to predict both from the grid. A person in box 7 should see their pay reflect that the organization knows what an expert is worth and is not waiting for them to become something else. A person in box 2 should be told what box 1 requires. The grid, shared with each person as their own placement, is the most honest career conversation most managers will ever have — and it takes five minutes, because the picture does the talking.

THE DISTRIBUTION IS A DIAGNOSIS OF THE MANAGER

A team that is all box 1 has a manager who cannot say no, or a bar set too low; a team that is all box 5 has a manager who has stopped looking. Over a year, people should move — up the grid as they grow, across it as they are challenged, and out of the bottom left one way or the other. A grid that looks the same two quarters running is a review that did not happen.

The fifteen-minute review.

The review is fast because the scoring is done before it and the conversations are done after it. The meeting itself argues only the disagreements and records the moves.

BEFORE • THE WEEK PRIOR

Score

Each manager scores their own people, both axes, one to three, alone. Performance from the quarter's key results; potential from the competencies against a named next role. The scores go into the roster before the meeting, not during it.

DURING • FIFTEEN MINUTES

Place and argue

The grid on the screen, the team's managers in the room, the leader deciding. Read the placements aloud. Agreements take seconds. Disagreements — usually about potential — get the argument, and the argument is "which next role, and which competency?" Leave with one move per person, written.

AFTER • WITHIN TWO WEEKS

Have the conversations

Every box 3, 6 and 9 gets its crucial conversation within two weeks, by the manager, with the leader briefed. Every box 1, 2 and 4 gets its stretch or its development named. Every box 7 gets told they are valued as they are. Then the roster is updated with what was agreed.

The agenda, in order

1. **Last quarter's moves.** Were they made? What changed? Thirty seconds a person; the roster's notes column is the record.
2. **The bottom left first.** Boxes 9, 6 and 8, because the conversations are overdue and the decisions are the hardest. Each gets a name, a date and an owner.
3. **The top right.** Boxes 1, 2 and 4: the stretch assignment, the succession note, the development budget. Say the pay conversation out loud here, so that it happens.
4. **The diagonal.** Boxes 7, 5 and 3: confirm the trusted professionals are being respected, the core is being trained, and the enigmas have a decision date.
5. **The shape.** Look at the counts. If box 1 is crowded, raise the bar. If nothing moved since last quarter, the review did not happen.

QUARTERLY, AND NEVER ALONE

Run it every quarter, on the quarter's key results, with every manager who has people on the grid. A nine box drawn by one leader in private is a list of opinions; drawn by the managers together, argued, and written down, it is the organization's shared picture of its people — and the thing the annual review was always supposed to be.

The template, and the checklist.

The workbook beside this document has three tabs. Blue is typed; black is computed; the sample names and scores are invented.

Read me

The two axes in one paragraph, the colour rule, and how the template pairs with the Competency Model and with key results.

Roster

One row per person: name, role, performance (1–3), potential (1–3). The box number, its name and its default move are computed; a notes column holds the move actually agreed. Box 1 turns teal; box 9 turns coral.

Grid

The team counted by box, laid out as the grid — lots of potential at the top, high performance on the right — with the sanity check beneath it.

BEFORE THE FIRST REVIEW

- ☐ Every person on the roster with their role
- ☐ The next role named for each, so potential has a target
- ☐ Performance scored from the quarter's key results
- ☐ Potential scored from the three competencies against the next role
- ☐ Scores entered by each manager, alone, before the meeting

IN THE REVIEW

- ☐ Last quarter's moves checked first
- ☐ Bottom left before top right
- ☐ Every disagreement argued as "which role, which competency"
- ☐ One move per person, written
- ☐ The pay conversation said aloud for boxes 1, 2, 4 and 7
- ☐ The shape read: is box 1 crowded? did anything move?

WITHIN TWO WEEKS

- ☐ Crucial conversations held for boxes 3, 6 and 9
- ☐ Stretch or development named for boxes 1, 2 and 4
- ☐ Box 7 told they are valued as they are
- ☐ Roster notes updated with what was agreed

EVERY QUARTER

- ☐ Re-scored on the new quarter's results
- ☐ Moves compared to last quarter's grid
- ☐ Clocks on boxes 6 and 9 checked: 45–60 days

EVERY YEAR

- ☐ Pay and responsibility reviewed against the year's placements
- ☐ The grid shared with each person as their own placement
- ☐ The question asked: could everyone on this team have predicted their year?