



TEAM SNAPSHOT FORM

Workplace leaders are expected to interact and work with their teams on an ongoing basis to see if they are functioning well. It is not acceptable to wait for a specific incident to arise – by that point, unnecessary damage has already occurred. Proactive monitoring of your team helps detect and resolve dysfunction in its early stages.

Use the Team Snapshot form to assess how individuals on your team, and how the team as a whole, are functioning. You should gather information in this form for each individual and team who report to you.

As with any tool, you can and should modify these general suggestions to include specific criteria for your workplace and any general requirements that exist in your region or jurisdiction.

Before completing the Team Snapshot form, review the job descriptions and profiles of each position on the team to remind yourself of the defined duties and expectations of individual team members, and gather additional information (from senior leaders perhaps), to better understand the overall mandate of the team.

A. General Baseline of Individual Performance

1. Name of Employee (Senior Leaders to include Managers and Supervisors in this Assessment)

2. Any past reported or observed concerns re Individual Job Performance?

Circle all that might apply:

Productivity Accuracy Safe Practices Documentation

Customer Service (incl public, patients, students, family, clients)

Other (Specify) _____

3. Any past reported or observed concerns re Reliability as a Team player?

Circle all that might apply:

Attendance Punctuality Trustworthiness Assisting Coworkers

Information Sharing & General Transparency

Respect for Supervisory Authority & Direction

Respectful Workplace Communication (Gossip, verbal and/or non-verbal disrespect)

Tolerance & Respect for Diversity (in work preferences and individual background)

Other (Specify) _____

4. If YES:

Has employee been made aware of these issues/concerns? Yes / No (Circle one)

Is employee on a formal performance improvement plan/progressive disciplinary track? Yes / No (Circle One)



B. General Baseline of Team Performance

1. Any observations or available metrics regarding the rate of turnover (including resignations and internal transfers), in general and as compared to other departments?

2. Any observations or available metrics regarding the rate of sick leave (including Workers Compensation and disability leaves) in general and as compared to other departments?

The baseline assessment itself may highlight issues with individuals that demand your immediate attention. You should not wait for an incident to happen if your baseline assessment shows current concerns with the performance, communication or behavior of certain team members, or reflects an active dispute between individuals or teams.

If your baseline reflects dysfunction, please feel free to contact Marli for immediate, helpful and practical advice on how to initiate the remaining steps of the MIRROR Method.

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