Job Scorecard Template

A template for defining what a role must achieve and how someone will need to work to achieve it, before anyone sees a résumé.

Most job descriptions describe a person who does not exist: strategic and detail-oriented, independent and collaborative, fast-moving and careful. A scorecard describes the job instead. It names what the person must achieve and how they will need to work to achieve it, and it does that before anyone sees a résumé.

Filling this in takes about 45 minutes with the hiring manager and one person who does the job well today. That 45 minutes is what every later step is measured against.

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1. Role mission

A mission is not a summary of duties. It is the argument for why this role should exist at all, and it is worth being honest in. Teams that skip this step tend to hire a version of the last person who held the job.

Answer each of the four questions below in two or three sentences. If one is hard to answer, that is information: it usually means the role is really two roles, or that it exists because the headcount was approved rather than because the work demands it.

Why this role exists. What is going undone today, or being done by people it shouldn't fall to? Be specific about the cost of the current arrangement. "We're growing" is not a reason. "Three senior engineers spend a day a week on manual reporting" is.

What success makes possible. Not what the person will do, but what the team gets to do once they are doing it well. A role is worth filling when it unlocks something beyond itself: a decision made faster, a risk retired, capacity returned to people who were spending it elsewhere.

What failure leaves the team navigating. The honest version of the downside. If this hire doesn't work, what is the team still working around twelve months from now, and who absorbs it? Writing this down does two things. It tells you what the role is really worth, and it tells you which competencies are genuinely non-negotiable rather than merely desirable.

Who they work with, and how. Most roles fail at the seams rather than in the centre. Someone can be technically excellent and still be wrong for a job that runs on persuading people who don't report to them. Map the three or four relationships that carry the most weight.

PERSON OR TEAM	HOW OFTEN	WHAT PASSES BETWEEN THEM	WHAT GOOD LOOKS LIKE
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That last column is usually where the competencies in section 3 come from. A relationship that needs patient translation asks for different behavior than one that needs fast, blunt escalation.

> **Example.** This role exists because our monthly close runs to the twelfth business day, so leadership makes decisions on numbers that are six weeks old. Done well, it puts accurate numbers in front of them by the fifth, and returns about two days a month to the FP&A team, who currently backfill the close. Done badly, the CFO keeps personally chasing reconciliations, the two-day drag on every decision stays, and we probably lose the FP&A analyst who has been covering it. The role works most closely with the CFO (weekly, raw numbers and judgment calls, good means she stops asking where things stand), the FP&A team (daily during close, handoffs and corrections, good means fewer rounds of rework), and the regional controllers (monthly, submissions chased and queried, good means they comply without escalation).

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2. Outcomes

Three to five things that must be true 12 months in for this hire to be a clear success. Each one measurable or observably done.

Attach three things to each one: what you actually measure, an early indicator that tells you within 90 days whether it is going right, and a lagging indicator that confirms it a year out.

The distinction matters because the measures that count are the ones that arrive too late to act on. If the only measure is "close runs by the fifth business day," you find out you were wrong in month eleven. An early indicator is weaker evidence, but it arrives while you can still coach, restructure the work, or face the fact that the hire was wrong.

A useful early indicator has three properties. You can observe it within 90 days. You can see it without asking the person how they think it's going. And it is plausibly caused by the behaviors you hired for, rather than by how busy the quarter happened to be.

#	OUTCOME	WHAT WE MEASURE	EARLY INDICATOR (30–90 DAYS)	LAGGING INDICATOR (6–12 MONTHS)
1				
2				
3				
4				

If you cannot write the lagging indicator, the outcome is too vague to hire against. If you can write the lagging indicator but not an early one, keep the outcome and mark it: that is a part of the job where you will be flying blind for most of the first year, and it raises the stakes on getting the behavioral competencies right.

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3. Behavioral competencies

The four to six ways of working that separate strong performers in this role. Rank them. Forcing a rank is what stops the list becoming a wish list.

The hard part is writing them as behavior rather than as labels. Job descriptions are full of labels, and labels cannot be interviewed for. "Strong communicator" is a category. What a person does on a Tuesday is a behavior, and a behavior is something a candidate can give you an example of.

The test: can you picture someone doing it, at a specific moment, in this job? If not, you have a label.

THE LABEL	WHAT THE PERSON IS ACTUALLY DOING
Strong communicator	Writes the update before the meeting, so the meeting is spent on decisions rather than status
Detail-oriented	Checks their own work against the source before passing it on, and catches about as many errors as the reviewer does
Self-starter	Picks up the next piece of work without being assigned it, and tells someone which one they picked
Collaborative	Asks the other team what their deadline is before proposing one
Resilient	Comes back within the week with a changed version of a rejected proposal, rather than quietly dropping it
Strategic	Can name the two things they would stop doing if the budget halved, and say why those two

Notice what the right-hand column gives you that the left doesn't. You can ask a candidate for a time they did it. You can rate the answer. Two interviewers can disagree about it and compare notes, because they are discussing the same observable thing.

Write yours at that level of specificity, in the language your team actually uses. If a competency on your list could be lifted into a job description for an unrelated role without changing a word, it is not describing this job.

RANK	COMPETENCY	WHAT IT LOOKS LIKE HERE	WHY THIS ROLE NEEDS IT
1			
2			
3			
4			

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To find these, ask the people who know the role: when this job gets hard, what do the best people do that others don't? What drains the people who leave?

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4. What this role is not

The behaviors that would make someone miserable or ineffective here. Naming these predicts early turnover as well as anything else on the page.

Write these the same way as section 3: what the person is doing or feeling, not a verdict on them. None of these are flaws. Each one is a strength somewhere else, which is exactly why it belongs to the role rather than to the candidate.

SOMEONE WHO…	…WILL STRUGGLE WHERE…
Is frustrated by the unknown, and wants the path mapped before starting	The first month is spent working out what the job actually is
Is drawn to solutions nobody has tried yet	The work is a regulated process that has to run the same way every month
Does their best thinking in long uninterrupted blocks	The day is six short meetings and whatever lands in between
Needs to see something finish	Projects run eighteen months and nothing visibly ships in between
Is energized by talking people round	The work is largely solitary and the main audience is a spreadsheet
Wants the standard explained so they can meet it	No standard exists yet and someone has to write it

The second column is the honest description of your role. If writing it makes you uncomfortable, that discomfort is useful information, and it will reach the candidate one way or another. Better in week one than month seven.

These usually surface in the same conversation as section 3. The question that produces them: think of people who left this role or burned out in it. What were they doing right before they decided to go?

5. Non-negotiables

The few things that genuinely rule someone out: a licence, a language, legal eligibility. Keep this list short. Most requirements are preferences wearing a disguise.

6. Sign-off

NAME	ROLE	AGREED
	Hiring manager	
	Interviewer	
	Interviewer	

Everyone who will interview signs the scorecard before the first interview. Without that, each interviewer measures against a private standard and the ratings cannot be compared.