Staff Alignment and Performance Checklist

Team Alignment & Communication

- ☐ Team members understand each other's working styles, priorities, and differences.
- ☐ The team meets regularly (daily, weekly, Monthly, Quarterly and Annually) to discuss goals and challenges.
- ☐ Staff take part in ongoing training or learning sessions monthly.
- ☐ Everyone feels comfortable speaking up and joining discussions.

Goals & Priorities

- ☐ The most important goal for this quarter is clearly defined and understood.
- ☐ A key priority measure is chosen to track progress.
- ☐ 3–5 main priorities are set and ranked to support the goal.
- ☐ A quarterly theme and reward are shared with all staff to motivate achievement.
- ☐ Progress is posted and updated weekly so everyone stays informed.

Meeting Rhythm

- ☐ All staff take part in a short daily focus meet up.
- ☐ Every team has a weekly meeting to review progress.
- ☐ Monthly sessions are held for training, problem-solving, and knowledge sharing.
- ☐ Quarterly and annual offsite meetings are held for big-picture planning.

Roles & Accountability

- ☐ Every area of the business has someone responsible for achieving results.
- ☐ The Accountability Chart is clear: right people in the right roles.
- ☐ Financial responsibilities are assigned line by line.
- ☐ Main business processes have clear owners.
- ☐ For long-term goals, external experts are consulted if needed.

Staff Input & Feedback

- ☐ Staff are encouraged to give feedback on obstacles and opportunities weekly.
- ☐ Managers check in with at least one team member each week ("Start/Stop/Keep").
- ☐ Insights from staff are shared in team meetings.
- ☐ A process exists to close the loop on staff feedback.

Customer Feedback

- ☐ Customer input is collected as often as financial data.
- ☐ Staff regularly speak with customers and share insights in meetings.
- ☐ All staff help gather customer feedback.
- ☐ A system is in place to act on customer feedback quickly.

Culture & Values

- ☐ Core values and company purpose are known and practiced by all staff.
- ☐ Praise and feedback reference the values and purpose.
- ☐ Hiring, training, and recognition processes align with company values.
- ☐ Quarterly actions are taken to strengthen company culture.

Strategy Awareness

- ☐ Staff know the company's big long-term goal (BHAG).
- ☐ Staff understand who the core customers are.
- ☐ Brand promises are clear and tracked weekly.
- ☐ Staff can confidently answer "What does your company do?"

Individual Performance

- ☐ Each person tracks 1–2 weekly performance indicators (KPIs).
- ☐ Each staff member has 1 Performance indicator tied to the company goal.
- ☐ Each staff member/team sets 3–5 priorities each quarter.
- ☐ Staff are supported by a coach or peer mentor to stay accountable.

Visibility & Tracking

- ☐ Company plans and results are visible to everyone.
- ☐ A "success room" (physical or virtual) is used for weekly updates.
- ☐ Core values, purpose, and priorities are posted around the workplace.
- ☐ Scoreboards display live progress on KPIs and Performance indicators.
- ☐ A tracking system is in place for priorities and KPIs across all teams.