Growth Edition 9-Box Talent Matrix Analytics User Guide
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9-Box Talent Matrix
9-Box Talent Matrix ("9-Box") gives managers a 2-dimensional matrix view with performance and competency ratings on two axes. 9-Box allows managers to see their team member’s position on the grid, track trajectories, compare people, coach people, assign mentors and identify future leaders. Managers can access to 9-Box easily and quickly on both desktop and mobile.

Admin Setup
In order to view 9-Box, you must make sure you have accounted for each of the items below:

1. Review Cycle

To access to 9-Box, you must have at least one review cycle setup. By default there’s one demo review cycle setup for you, and you can delete it if you want.

If you want to schedule a review cycle, go to Scheduling page in Settings, and setup the dates for goal setting, self-review and manager review sub-cycles.

2. Manager and Employee

You need to have at least a manager and an employee in the organization, so the manager can login to view the team analytics on 9-Box. By default, you will be administrator as well as manager, and you have a demo employee reports to you. You can delete it if you want.

Go to Settings page and click on the People. You will then be able to add, edit or delete people, assign a role and add a manager to this employee. Then this employee will appear on the team analytics page.

Manager Section
9-Box Analytics page is accessible to managers from the Dashboard. If there’s at least one review cycle, you can access the page and see the 9-box. If you have at least one direct report, this person will be on the 9-box grid.

Click on View Team Analytics button on Analytics widget after you setting up a review cycle and a team structure.
9-Box

When navigating to 9-Box Analytics page, you can see a 9-Box grid in Performance axis (Y-axis) and Competency axis (X-axis), your team members will be displayed on the grid and their position is based on the performance and competency score.
**Grid**

Each grid has label and description, the description will give you an idea of what each grid means, and how each team member on this grid position is performing.

For example, you will see people who are “Starring”, you must retain this employee and ensure that they remain engaged. This person should be getting a great deal of your time not on direct supervision, but on learning their aspirations, providing them with challenge and growth, involving them in special projects, and attuning to their motivational drivers.

**Review Cycle**

Review cycle selector is on the top-right of the page, and shows all the review cycles from the past to the future. There’s a red bubble on the cycle selector showing the number of open cycles. You can select any cycle to view your team’s performance review on 9-Box.
**Team Member**

You team members on the 9-Box are displayed with either avatar or initials if they don’t have an avatar uploaded.

9-Box will let you know if someone’s review has been submitted. The submitted one has a solid brand color, and the other one has a dull, faded brand color.

You can find out if someone’s review is not submitted by going to manager review to finish the ratings on goals and competencies where you can come back to 9-Box to view where this employee is placed on the grid.

You can easily compare people on the 9-Box. A person with high performance with low potential can be easily compared with a person with equally good performance and potential.

**Employee Profile**

Clicking on the team member will show the right panel with team member’s details in each review. You will see their roles, number of direct reports, user tags, and admin tags.

9-Box will calculate performance strengths and weakness, competency strengths and weakness, based on the score of goal and competency from performance review.

You will see their position on grid as well. If team member’s review is not submitted, you can still see their review profile information, e.g. role type, tags and number of direct reports.
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