READY-TO-USE TEMPLATE

Your Monthly Leadership Review

A ready-to-use monthly review with four lenses and one supported commitment.

30 minutes | Leadership scorecard · Results / People / Execution / Growth

Use the supplied wording as it is, or change it together. The Word file and Notion template are editable. Keep only notes you need.

Results · What changed for the people we serve?

Bring one or two pieces of evidence. Distinguish completed activity from a useful result.

What became easier or better?
What evidence supports that?
What did not improve?
Whose experience is missing from our account?

People · What did this month ask of us?

Invite people's own accounts; do not turn mood or engagement into a guessed score.

Where was work sustainable, and where did it rely on extra effort?
Who could get help?
Who had less voice or access?
What support or repair do we owe?

Notes and changes for our situation

Your Monthly Leadership Review

WORKING AGENDA / CONTINUED

Execution · How did the work move?

Look at handoffs, clarity, decisions, and recurring friction. Avoid assigning every delay to an individual.

Where did work wait or return?
Which decision or boundary was unclear?
What helped the work move well?
Which condition could we change?

Growth · What can we do or understand now?

Include learning from a changed assumption, not only courses or promotions.

What did we learn in real work?
Who had a chance to practice?
What assumption changed?
What still needs time, access, or feedback?

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

Choose one commitment

A review should reduce confusion, not create an unaffordable action list.

One change to try:
Who will shape it with us:
Owner and decision authority:
Time or support we will make available:
What we will stop or reduce:
How and when we will check its effect:

Close the loop

Share the agreed action and relevant context; keep personal information with the people who own it.

What can be shared with the team?
What should remain private?
Who needs an update from me?
Date of our next review:
At the next review, begin with what happened to this commitment.

The thinking behind it

What gets reviewed becomes easier to notice. Put working conditions and people's own accounts beside delivery outcomes, so a good number cannot hide an unsustainable month.

Read The Search For Unapologetic Impracticality In Leadership: Part I - What We Measure, And What It Hides by Nic Payne

Keep the useful part

A shared record, not a transcript. Agree what belongs here and what should stay private.

Date / people / purpose

What we agreed

Next step / owner / support / date

What remains open

When we will return to it

What did I reward this month, whether I meant to or not?