



The 3P Filter Matrix

Team Member Assessment Tool

Employee Name:

Role / Department:

Manager / Date:



The 3P Filter Matrix

Most leaders can name their best people in seconds. Ask them to explain why, and the conversation gets harder. This tool exists to make that explanation clear. Not just who your players are, but how each one functions, and exactly what that means for how you lead them.

The Performance and Potential Matrix maps where someone stands right now. How they are performing. How much runway they have to grow. The 3P Filter turns that placement into a leadership posture: **Partner, Project, or Problem**. Each one tells you something different. Not about the person's worth, but about the relationship you need to build with them.

PARTNER

This person has earned your trust and your investment. Protect them. Challenge them. Do not leave them alone just because they can operate without you. That is the trap.

PROJECT

This person has the character. They need the clarity, the coaching, and the relationship. Your job is to build the path and walk it with them. Development is not optional.

PROBLEM

Performance has failed or the leader-employee relationship has reached its limit. Either way, the most professional and compassionate move is to release them well. Reintroduce them to the industry with dignity.

Work through each step. Be honest. This is a mirror, not a report card.

Place on the Matrix

Use what you know about this person. Not a score, an assessment. Where does their performance actually land over time? What does their genuine capacity for growth look like? Evidence first. Instinct second. Place them based on pattern, not a single moment.

	LOW POTENTIAL Settled. Limited growth runway.	MODERATE POTENTIAL Growable with the right conditions.	HIGH POTENTIAL Learning-agile. Growth ceiling is high.
HIGHLY EFFECTIVE	Box 4: The Specialist [PARTNER] Deep expertise. Exceptional results. May not seek new roles, and that is OK. Protect the knowledge.	Box 7: The Reliable [PARTNER] Exceptional results and solid growth potential. Highly valuable. Could take on more if challenged.	Box 9: The Star [PARTNER] Clear future leader. High performer with highest growth ceiling. Protect, challenge, develop fast.
EFFECTIVE	Box 2: Plateau Watch [PROJECT] Solid performer, limited growth ceiling. Reliable in current role. Ceiling conversation needed.	Box 5: Utility Player [PROJECT] Meets expectations. Moderate potential. Can grow with the right investment and direction.	Box 8: Future Star [PROJECT] Not yet fully delivering but high ceiling. New to role or org. Invest now, high upside.
LESS EFFECTIVE	Box 1: Low Performer [PROBLEM] Not delivering. Unlikely to improve or adapt. Culture risk if unaddressed. Immediate action required.	Box 3: Borderline [PROBLEM] Inconsistent delivery. May be misplaced or disengaged. 90-day clarity required before final determination.	Box 6: The Diamond [PROJECT] Underperforming but learning-agile. May be new, misplaced, or underdeveloped. High-stakes call. Diagnose before you decide.

← Less Learning Agile

More Learning Agile →

PARTNER

Boxes 4, 7, 9

High performers who anchor culture and carry the team forward. Protect, develop, reward. Do not neglect them because they can run without you.

PROJECT

Boxes 2, 5, 6, 8

Investable talent. Underperforming for a reason, or plateauing. Define a clear path, timeline, and checkpoint. This person needs structured investment.

PROBLEM

Boxes 1, 3

Not delivering and unlikely to. Culture erosion risk. Address immediately. The leader's first job is to check their own clarity, then act decisively.

Confirm the 3P Category

The matrix guides placement. These questions lock in the category. Answer honestly.

PARTNER

(Boxes 4, 7, 9)

Confirm YES to ALL:

- ☐ Performing at or above expectations consistently
- ☐ Would I rehire this person today without hesitation?
- ☐ They elevate culture, not just their own output
- ☐ I would be genuinely upset to lose them

Partner Type:

- ☐ Star (Box 9)
- ☐ Reliable (Box 7)
- ☐ Specialist (Box 4)

PROJECT

(Boxes 2, 5, 6, 8)

Confirm YES to at least ONE:

- ☐ Performing, but growth has plateaued and they are still investable
- ☐ Underperforming, but I believe there is a real reason
- ☐ I can define a specific development path with milestones
- ☐ I would rehire them if the gap is closed within 90 days

Project Type:

- ☐ Future Star (Box 8)
- ☐ Utility Player (Box 5)
- ☐ Plateau Watch (Box 2)
- ☐ Diamond (Box 6)

PROBLEM

(Boxes 1, 3)

Confirm YES to ANY ONE:

- ☐ Not delivering and I have lost confidence in the reason
- ☐ They are draining culture, morale, or team energy
- ☐ I cannot define a credible 90-day improvement path
- ☐ I would not rehire them today under any circumstances

Problem Type:

- ☐ Clear Problem (Box 1)
- ☐ Borderline, 90-day clarity needed (Box 3)

FINAL 3P DETERMINATION

☐ PARTNER ☐ PROJECT ☐ PROBLEM

Nine-Box Placement:

Box # _____

Name: _____

WHAT CHANGES BECAUSE OF THIS PLACEMENT?

Your Leadership Posture

Placement is only the beginning. Each category defines a different kind of relationship. Your job is to understand the posture each one demands, and lead from it.

PARTNER

The relationship: high-trust, high-challenge.

- Don't leave them alone just because they can operate without you. That is the trap.
- Schedule regular one-on-ones. Keep them.
- Give honest feedback and stretch assignments.
- Acknowledge their contribution visibly and specifically.
- Have the succession conversation before they start having it privately.
- **Ask:** what does the next chapter look like for you here?

PROJECT

The relationship: developmental, structured, patient.

- Define the specific gap. Name it clearly. This person needs to know exactly what they are working toward.
- Set a 90-day development plan with weekly check-ins.
- Expect the messy middle. Progress, not perfection.
- Model what good looks like, then let them try.
- Celebrate every improvement, however small.
- **Ask:** what do you need from me this week?

PROBLEM

The relationship: clear, direct, and time-limited.

Before you finalize this determination, check yourself:

- Have you given this person clear, documented expectations?
- Have you provided honest feedback with a fair timeline?
- If no, that is on you. Start there. Clarity is the leader's responsibility.

If yes, and performance remains unacceptable:

- The most professional and compassionate move is to release them with dignity. See the Problem Exit Protocol below.

Leadership Actions by 3P Category

Your category is only as useful as what you do next. Every box has a required action. None of them are optional.

CATEGORY	BOX	BOX NAME	REQUIRED LEADERSHIP ACTION
PARTNER	Box 9	The Star	Challenge aggressively. Assign stretch projects. Discuss succession path. Create a flight risk plan. Do not neglect them with the assumption they are fine.
	Box 7	The Reliable	Recognize consistently. Evaluate whether they have more runway than you have offered. Watch for signs of ceiling versus ceiling imposed by lack of opportunity.
	Box 4	The Specialist	Protect the expertise. Acknowledge their value without requiring leadership ambition. Ensure they feel seen without pushing them toward roles they do not want.
PROJECT	Box 8	Future Star	High investment required now. Set 90-day milestones. Assign a mentor. Check in weekly. Performance gap is likely situational, diagnose the root cause.
	Box 5	Utility Player	Define the next level. Give targeted stretch assignments. If they plateau here permanently, monitor for culture drag and re-evaluate in 90 days.
	Box 2	Plateau Watch	Have the honest conversation about ceiling. Confirm whether they are content or stuck. If they want growth, identify what that path looks like and whether the org can support it.
	Box 6	The Diamond	High-stakes call. Diagnose why performance is low despite agility. May be misplaced, undermanaged, or new. Set a 60-day specific improvement target.
PROBLEM	Box 3	Borderline	90-day structured improvement plan with weekly check-ins. Define the exact gap, the exact standard, and the exact deadline. No ambiguity. At 90 days: Partner or Problem. Borderline is not a permanent address.
	Box 1	Low Performer	Immediate action plan. Begin documentation now. Define non-negotiable performance floor. If no movement in 30 to 60 days, begin exit process. Do not wait. Refer to the Problem Exit Protocol.

What They Actually Mean

Box 9 The Star [PARTNER]	This is your clearest win. High performer. High ceiling. They are already carrying weight and they want more. The mistake most leaders make? Assuming the Stars are fine because they never complain. They are not fine. They are quietly evaluating their options. Get ahead of it. Challenge them. Talk succession. Build the plan before they build their exit.
Box 7 The Reliable [PARTNER]	Don't confuse average energy with average output. Reliables produce. They are not flashy, but they are consistent, and they elevate the room without making noise about it. Your job is to recognize that and make sure they know you see it. Check your assumptions about their ceiling. Sometimes it is higher than they have been given a chance to show.
Box 4 The Specialist [PARTNER]	Exceptional results, deep expertise, limited interest in climbing. That is not a flaw. That is a feature. Stop trying to turn them into managers they do not want to be. Protect the knowledge. Protect the relationship. Let them be excellent where they are.
Box 8 Future Star [PROJECT]	The gap in Box 8 is situational, not fundamental. They haven't arrived yet, but the engine is there. This person needs investment now. Mentorship. Check-ins. Clarity on what good looks like. If you do not invest, you lose them to someone who will. The ceiling is high. The window to develop them is short.
Box 5 Utility Player [PROJECT]	Meets expectations. Moderate upside. Classic middle of the roster. Not a problem, but not a driver either. Your job is to define what the next level actually looks like and see whether they are willing to chase it. Some people are happiest here. That is OK. Just do not mistake contentment for ceiling.

What They Actually Mean

Box 2
Plateau Watch
[PROJECT]

Solid past, uncertain future. They have been dependable, but growth has stalled. Have the honest conversation. Are they content here, or are they stuck? If they want more and the org can support it, build the path. If neither is true, monitor the situation. Left unaddressed, this drifts toward disengagement.

Box 6
The Diamond
[PROJECT]

This is the most misread box on the grid. High agility, low output. Before you make a call, ask whether the environment gave them a real shot. Misplaced roles, unclear expectations, and undermanagement produce Box 6s from people who could be Box 9s. Diagnose before you decide.

Box 3
Borderline
[PROBLEM]

Do not skip this box hoping it resolves itself. It will not. You have 90 days to get clarity, and you have to be the one who creates it. Define the gap precisely. Set the standard. Check in weekly. At the end of 90 days, this person becomes a Partner or a Problem. Borderline is not a permanent address.

Box 1
Low Performer
[PROBLEM]

You already know. You have probably known for a while. The longer you wait, the more it costs, in team morale, in your own credibility, and in the time you spend managing around someone instead of forward. Immediate action is not optional. Start the documentation now. Define the floor. Hold it.

Why reintroduce to industry?

Keeping a Problem in place costs everyone. The team loses morale and stops trusting your decisions. You lose credibility and time you should be investing elsewhere. And the person stuck in a role that is not right for them loses the chance at a better fit.

The gracious exit is not just good management. It is good leadership. You are not giving up on a person. You are giving both of you clarity. A clean release, handled with professionalism and respect, frees them to find where they actually belong. That is worth doing right.

This is not personal. It is your responsibility.

The Six Steps

1	Check yourself first. Before the exit, audit the relationship. Did you give this person clear, documented expectations? Did you provide honest feedback with a fair timeline? Did you give them a real opportunity to close the gap? If the answer to any of those is no, that is where you start. Clarity is the leader's responsibility. Address it before you act.
2	Define the floor. Document the non-negotiable performance standard. Write it down. Be specific. Vague expectations produce vague results. If you can't define what acceptable looks like in concrete terms, you are not ready to act.
3	Set the timeline. 30 or 60 days. Not indefinitely. Not "until it gets better." A specific date. Communicate it directly: "Here is the standard. Here is the deadline. Here is what happens if we do not get there." No ambiguity.
4	Have the direct conversation. Factual, not emotional. Kind, not soft. This is not an ambush and it is not a negotiation. State what is happening, what the standard is, what the timeline is, and what the outcome will be if nothing changes. Then let them respond.
5	Execute the exit. When the timeline closes without meaningful movement, act. Brief, professional, and final. Do not revisit it in the meeting. The decision has been made. Your job now is to communicate it with clarity and care.
6	Reintroduce to industry. Release this person with dignity. They may be better suited elsewhere and likely are. Help where you appropriately can. A clean, respectful exit protects your team culture, your reputation as a leader, and gives the departing person the best chance at a fresh start. This is not personal. It is leadership.

Three Mistakes Leaders Make With This Tool



1	Placing everyone in the middle. The middle of the grid is not safe. It is avoidance. If everyone lands in Box 5, the tool is not doing its job. Push yourself. The people who are clearly Partners or Problems deserve to be called what they are.
2	Treating the placement as permanent. This is a snapshot, not a sentence. Box placements change. A Box 6 can become a Box 9 with the right investment. A Box 7 can drift to a Box 2 with neglect. Revisit the grid with your direct reports every 90 days.
3	Skiping the evidence. Instinct is a starting point, not a conclusion. If you cannot point to specific, observable patterns for your placement, you do not have enough data to make a call. You have an opinion. Get more reps with this person before you finalize the placement.

Discussion Notes / Manager Reflection

What is the single most important action I need to take with this person in the next 30 days?

Is the gap I am seeing a skill gap, a will gap, or a fit gap?

What am I doing, or not doing, that may be contributing to this placement?

If I placed this person here 90 days ago, did they move? Why or why not?

Would I rehire this person today? If not, what needs to change, and by when?