

Job Fit Evaluation Worksheet

Is Your Employee in the Right Role?

Use this worksheet to check if your team member is in the right seat, or if it's time to tweak, stretch, or switch things up. Because when people are in roles that energize them, everybody wins.

Step 1: Gut Check

On a scale of 1 to 5, how much does this person...

1 = Not at all • 2 = Slightly • 3 = Moderately • 4 = Quite a bit • 5 = Absolutely

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|--|-----|-----|-----|-----|-----|
| 1. Seem energized by their daily work? | __1 | __2 | __3 | __4 | __5 |
| 2. Thrive on the responsibilities they have been given? | __1 | __2 | __3 | __4 | __5 |
| 3. Show interest in growing or learning in their role? | __1 | __2 | __3 | __4 | __5 |
| 4. Handle challenges in stride (vs. feeling overwhelmed or checked out)? | __1 | __2 | __3 | __4 | __5 |
| 5. Align with your company values and culture? | __1 | __2 | __3 | __4 | __5 |
| 6. Take initiative and ownership of their work? | __1 | __2 | __3 | __4 | __5 |

Total Score: _____ / 30

- **25-30:** Sweet spot! They're probably in a great-fit role.
- **18-24:** There's potential, but maybe time for a conversation.
- **Below 18:** Ding ding ding! Let's explore what's not working.

Step 2: Ask & Reflect

Use these prompts to guide a meaningful check-in or self-reflection:

- What part of the job gives you energy?
- What drains you or feels like a struggle?
- Is there a skill you'd love to use more often?
- Where do you see yourself growing within the team or company?
- What would help you feel more fulfilled at work?

Step 3: Small Tweaks, Big Impact

Here are a few bite-size adjustments that could make a big difference:

If they're...	Try this...
Great at their job but bored	Add stretch projects or mentorship opportunities
Struggling with part of the role	Reassign tasks, or add support in those areas
Missing creative freedom	Offer autonomy in how goals are met
Feeling stuck	Set new growth goals or adjust expectations
Culturally misaligned	Talk values, offer flexibility, or shift teams

Pro Tip: Fit is a feeling and a function.

If someone's not lit up by their role, it's not always a motivation issue. It might just be time to reshape the puzzle pieces.