PERFORMANCE INTELLIGENCE CASE RECORD

1. IDENTIFY THE SIGNAL

State what changed before assigning a cause.

Case

Enter a short issue name or tracking ID.

Steward

Constellation

People

Opened

Last reviewed

Status

- [ ] Open
- [ ] Reassessing
- [ ] Closed

What caused you to look more closely?

What is different from what you expected or from what existed before?

Signal

- [ ] Single observation
- [ ] Possible pattern
- [ ] Established pattern
- [ ] I don't know yet

Why does this deserve closer attention?

DIAGNOSTIC WORKING ROUTE

1. Identify the Signal | pp. 1-2
2. Gather Evidence | pp. 3, 5-6
3. Evaluate Evidence | pp. 4, 7-8
4. Diagnose the Work Universe | pp. 9-12
5. Stewardship Check / Mirror | pp. 13-15
6. Decide | pp. 16
7. Act | pp. 17
8. Follow Up | pp. 18-19

The Mirror may also be used independently for deliberate Steward self-examination.

OBSERVATION & INTERPRETATION RECORD

1. IDENTIFY THE SIGNAL

Separate what happened from what it may mean.

What I observed

Record observable facts.

What I think it might mean

What am I assuming?

What don't I know?

What might another Steward conclude differently?

EVIDENCE RECORD

2. GATHER EVIDENCE

Use all relevant sources; gather information without assuming that it establishes cause.

Direct Observation

What can be seen directly in the work? Separate observation from interpretation.

Meaningful Conversations

What have people close to the work explained, challenged, or clarified?

Patterns and Trends

What becomes visible through repetition or movement over time?

Organizational Outcomes

What results or measures show consequences? Outcomes alone do not establish cause.

EVIDENCE CHALLENGE RECORD

3. EVALUATE EVIDENCE

Seek contradictory evidence and identify what must be learned before diagnosing.

What evidence does not fit your current explanation?

What evidence do you still need?

How can you obtain it?

What should you not assume while you wait?

Enough evidence to continue?

- [ ] I have enough evidence to continue.
- [ ] I need more evidence before diagnosing.

EVIDENCE LOG 1

2. GATHER EVIDENCE | 3. EVALUATE EVIDENCE

Record the source, the observation, and what the input may support.

Date	Evidence / Observation	Source	What It May Tell Me

EVIDENCE LOG 2

2. GATHER EVIDENCE | 3. EVALUATE EVIDENCE

Record the source, the observation, and what the input may support.

Date	Evidence / Observation	Source	What It May Tell Me

EVIDENCE LADDER REVIEW

3. EVALUATE EVIDENCE

The Ladder describes confidence in overall understanding; Evidence Weight concerns individual inputs.

Highest Evidence Ladder level honestly reached

Assumptions and Opinions sit below the evidence threshold. Do not manufacture certainty or treat the Ladder as a numerical score.

What evidence supports this level of understanding?

What contradictory evidence lowers or challenges that confidence?

What must be verified or learned before a defensible diagnosis?

Carry individual inputs into the Evidence Weight Review on page 8. More information does not automatically mean stronger evidence.

EVIDENCE WEIGHT REVIEW

3. EVALUATE EVIDENCE

Judge the influence of each input qualitatively. Keep this judgment separate from the Evidence Ladder.

Input 1 / source

Credibility and relevance

Corroboration and contradictory evidence

How much influence should this input have on my judgment, and why?

Input 2 / source

Credibility and relevance

Corroboration and contradictory evidence

How much influence should this input have on my judgment, and why?

Input 3 / source

Credibility and relevance

Corroboration and contradictory evidence

How much influence should this input have on my judgment, and why?

Use another working copy of this page if more inputs require deliberate examination. Do not calculate a total.

THE STEWARD'S DIAGNOSTIC™

4. DIAGNOSE THE WORK UNIVERSE

Carry forward the evidence evaluation on pages 4 and 7-8. Test explanations before deciding.

What condition appears to be producing the signal?

What evidence most strongly supports that conclusion?

What remains uncertain?

What requires further examination before you decide?

WORKING DIAGNOSIS RECORD

4. DIAGNOSE THE WORK UNIVERSE

A working diagnosis remains subject to contradictory evidence and alternative explanations.

My current Working Diagnosis

Evidence supporting it

Evidence that does not fit it

CHALLENGE THE DIAGNOSIS

4. DIAGNOSE THE WORK UNIVERSE

Use the ordered explanation review on page 12; clear evidence may point to another level.

What could prove this diagnosis wrong?

Strongest reasonable alternative explanation

Confidence

- [ ] Low
- [ ] Moderate
- [ ] High

Where does the evidence currently point? Select all that apply.

- [ ] Individual
- [ ] Constellation
- [ ] Work Universe
- [ ] Organization
- [ ] Steward

What must you challenge in your own conclusion before acting?

TEST THE EXPLANATIONS

4. DIAGNOSE THE WORK UNIVERSE

Test explanations in the default order below; clear evidence may already point to another level.

Individual → Constellation → Work Universe → Organization → Steward

Individual

What individual capability, behavior, or circumstance could explain the signal? Record supporting or contradictory evidence.

Constellation

What relationships, coordination, or shared commitments could explain it? Record supporting or contradictory evidence.

Work Universe

What conditions, resources, expectations, or Decision Rights could explain it? Record supporting or contradictory evidence.

Organization

What broader structures, policies, systems, or constraints could explain it? Record supporting or contradictory evidence.

Steward

How might my decisions, behavior, intervention, or inaction contribute? Record supporting or contradictory evidence.

The sequence is a discipline for inquiry. It does not establish blame or exempt the Steward from evidence.

THE STEWARD'S MIRROR™

5. STEWARDSHIP CHECK | EXAMINATION AREAS 1-5

Examine your own behavior using recent work, decisions, feedback, and Constellation evidence.

Curiosity

What did I investigate before reaching a conclusion? What did I fail to ask?

Visibility

What actual work have I observed directly? What might I be missing?

Relationships

What recent interactions show how well I understand and support people?

Communication

What have I made clear? Where have my words or actions left ambiguity?

Humility

What evidence or feedback has challenged my judgment? How did I respond?

Self-examination develops a leadership hypothesis; it does not replace evidence from the Work Universe.

THE STEWARD'S MIRROR™

5. STEWARDSHIP CHECK | EXAMINATION AREAS 6-10

Examine your own behavior using recent work, decisions, feedback, and Constellation evidence.

Fearless Communication

How have my responses made truth safer than silence, or made people hesitate?

Stewardship

What conditions have I strengthened, neglected, or weakened through action or inaction?

Shared Ownership

Where are people carrying decisions and commitments? Where am I creating dependence?

Drift

What has pulled me away from active Stewardship? What evidence shows the effect?

Renewal

What evidence indicates that I should deliberately change my behavior or approach?

Self-examination develops a leadership hypothesis; it does not replace evidence from the Work Universe.

THE STEWARD'S MIRROR™

5. STEWARDSHIP CHECK | SYNTHESIS AND ACTION

Use the ten examination areas on pages 13-14; choose one intentional change and reassess through real work.

What did the Mirror reveal?

What might I be contributing to this condition?

What would I see differently if leadership were part of the explanation?

Does my leadership require action regardless of what else I discover?

- [ ] Yes
- [ ] No
- [ ] Uncertain

What requires my attention?

One leadership behavior I will change during the next thirty days

Evidence I will look for

Reassessment date or condition

DECISION RECORD

6. DECIDE

Choose the evidence-proportionate response before carrying the decision into the Work Universe.

What is the risk of acting now?

What is the risk of waiting?

What decision does the evidence support?

A defensible decision may be to act, gather more evidence, or wait with an explicit reason and review point.

What evidence, date, or condition will trigger reassessment?

Next reassessment date or condition

EVIDENCE-JUSTIFIED RESPONSE RECORD

7. ACT

Carry out the decision recorded on page 16. A decision to wait still requires follow-up.

Response direction - select all that apply.

- ☐ Clarify expectations
- ☐ Direct conversation
- ☐ Gather more evidence
- ☐ Coach
- ☐ Remove an obstacle
- ☐ Restore accountability
- ☐ Change the Work Universe
- ☐ Change my leadership
- ☐ Engage another resource
- ☐ Take no action yet

Action I will take

Why the evidence justifies it

What I expect to change

What I will watch for

Action date

Reassessment date

REASSESSMENT RECORD

8. FOLLOW UP

Compare the result with the decision and revise your understanding when evidence changes.

What happened after I acted?

What changed?

What did not change?

What new evidence emerged?

Does the evidence still support the Working Diagnosis?

- [ ] Yes
- [ ] Partially
- [ ] No
- [ ] Too early to know

What does that answer require you to reconsider, continue, or change?

INTELLIGENCE GAINED & CASE CLOSURE

8. FOLLOW UP

Close the case only when the evidence supports closure and the learning is carried forward.

What did this teach me about the individual?

What did this teach me about the Constellation?

What did this teach me about the Work Universe?

What did this teach me about my Stewardship?

What do I know now that I did not know when I opened this Case?

Date closed

What evidence justifies closing this Case?

PERFORMANCE INTELLIGENCE PATTERN RECORD

SUPPLEMENTAL WORKING RECORD

Review period | **Cases reviewed**

Repeated signals

Repeated diagnoses

Repeated Steward conditions

Repeated Work Universe conditions

Repeated accountability / communication conditions

PATTERN INTELLIGENCE - SYSTEM VIEW

SUPPLEMENTAL WORKING RECORD

Which interventions do I keep making, and which work or fail?

What conditions appear only under particular circumstances?

Which individual problems may actually be system patterns?

What deserves action because I can now see the pattern?

Review date

DEPARTURE RECORD

SUPPLEMENTAL WORKING RECORD

Departure 1 - role

Departure 2 - role

What do we know about why Departure 1 left?

What do we know about why Departure 2 left?

What do the departures have in common?

What appears unrelated?

DEPARTURE RECORD - REVIEW

SUPPLEMENTAL WORKING RECORD

What evidence exists beyond what each person told us?

What changed in the Work Universe before the departures?

What might leadership be contributing?

What should I examine now rather than waiting for another person to leave?

STEWARD'S PERFORMANCE INTELLIGENCE REVIEW

SUPPLEMENTAL WORKING RECORD

Cases / period reviewed

What I notice quickly

What I tend to miss

Where my first interpretations are often wrong

What I tend to blame too quickly

What I avoid confronting

STEWARD INTELLIGENCE - CARRY FORWARD

SUPPLEMENTAL WORKING RECORD

What might the people I Steward be experiencing that I am not seeing clearly enough?

What have these Cases taught me about myself as a Steward?

What leadership behavior should I change?

What requires Courage from me now?

One thing I will do differently because of what the evidence taught me