

## LEARNING, UPGRADED WORKED EXAMPLE

# Manager Observation Notes to Behavior Evidence Scorecard

Turn loose manager feedback into a behavior evidence scorecard with observable criteria, confidence, support needs, and evidence limits.

## Try this one thing today

Ask one manager this week: what behavior did you actually see, and what support would make that behavior easier next time?

## The messy version

### Loose manager notes

Some people are still confused. Better than before, but a few managers said they still need help with exceptions. I think the job aid helped, but it is hard to tell who is ready.

### What to notice

- The note has a useful signal, but no named behavior.
- The word confused might mean knowledge, confidence, tool friction, manager coaching, or unclear workflow ownership.
- Better than before is not evidence until the team knows what changed and what was observed.
- The note does not separate learner readiness from support needs in the system.

## Before

### Managers say people are less confused.

The feedback is directional, but it cannot show which behavior changed, how confident managers are, what example proves it, or what support is still needed.

## After

### Managers observed correct exception routing in live work.

Behavior: choose the right exception path. Criteria: names the exception type, checks the account condition, routes to the right owner. Confidence: usually. Evidence limit: three manager notes from two regions, not a full business-impact claim.

## Why this is better

- The scorecard names the behavior instead of reporting a mood.

- Observable criteria make manager feedback more consistent.
- Confidence is honest without pretending the signal is more precise than it is.
- The support need points to the next system move.

## Three ways to build it

### Manual way

Bring three manager notes into a 15-minute huddle. Underline the behavior words, circle the evidence, and rewrite each note into behavior, criteria, confidence, example, support need, owner, and limit.

### Microsoft 365 or Google Workspace way

Use Microsoft Forms or Google Forms for capture, then send responses to Excel, Lists, or Sheets. Add filtered views for low confidence, high support need, and missing examples.

### AI-assisted way

Ask AI to classify approved manager notes into behavior evidence fields, flag vague language, and draft follow-up questions. Remove sensitive details and validate every claim before sharing.

#### AI output validation

These prompt starters were created for the May 2026 model landscape. Verify all AI outputs before using them with learners, reviewers, leaders, customers, partner teams, or compliance-sensitive work. Do not paste sensitive or proprietary material into an AI tool unless your organization has approved that tool for that data.

## Behavior Evidence Scorecard

Recreate these fields in a document, spreadsheet, List, Sheet, or working note.

- Program: New quote workflow
- Behavior: Choose the right exception path
- Observable criteria: Names exception type; checks account condition; routes to the right owner
- Confidence: Usually
- Work example: Two managers saw correct routing on discount exceptions
- Support need: Need one-page exception aid in the workflow tool
- Follow-up owner: Onboarding lead
- Evidence limit: Small sample from two regions. Shows early behavior signal, not business causation.
- Date: 2026-05

## Copy-ready artifact

# Behavior Evidence Scorecard | Program | Behavior | Observable criteria | Confidence | Work example | Support need | Follow-up owner | Evidence limit | Date | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | | | |  
 Not yet / Inconsistent / Usually / Consistently | | | | | Review rule: - Behavior evidence needs a visible behavior. - Manager notes need criteria before they become comparable. - Every scorecard needs an evidence limit.

## Prompt starters

### ChatGPT GPT-5 family

Use an outcome-first prompt with the job, approved source material, constraints, and the exact artifact you want back.

I am working on Turn manager notes into behavior evidence for an L&D system problem. Goal: Help me turn the notes below into a practical next move. Context: Use this when manager feedback needs to become a lightweight behavior evidence scorecard without overclaiming impact. Use these working fields: behavior, observable criteria, confidence, work example, support need, follow-up owner, evidence limit. Rules: - Use only the source notes I provide. - Do not invent policy details, metrics, learner needs, compliance requirements, or business context. - Separate known facts, assumptions, missing information, and next actions. - Flag anything that needs requester, reviewer, leader, legal, compliance, LMS owner, or manager confirmation. - Keep the output practical enough to review in a working meeting. Source notes: [paste approved notes here] Return: 1. Behavior evidence scorecard 2. Known facts 3. Assumptions 4. Missing information 5. Support patterns 6. Evidence limits 7. Recommended follow-up

### Claude 4 family

Use XML-style sections so context, source material, task, constraints, and output format stay separate.

```
<context> I am working on Turn manager notes into behavior evidence for an L&D system problem. Use this when manager feedback needs to become a lightweight behavior evidence scorecard without overclaiming impact. </context>
<source_notes> [paste approved notes here] </source_notes> <task> Turn the source notes into a practical next move using these working fields: behavior, observable criteria, confidence, work example, support need, follow-up owner, evidence limit. </task> <constraints> Use only the source notes provided. Do not invent policy details, metrics, learner needs, compliance requirements, or business context. Separate known facts, assumptions, missing information, risks, and next actions. Flag anything that changes scope, ownership, evidence, risk, or decision rights. </constraints> <output_format> 1. Behavior evidence scorecard 2. Known facts 3. Assumptions 4. Missing information 5. Support patterns 6. Evidence limits 7. Recommended follow-up </output_format>
```

### Gemini 3 family

Use a clear task, labeled input, and one example pattern. For Obsidian context, use approved excerpts, Drive exports, Google Docs, or NotebookLM source sets.

Task: Help me make progress on Turn manager notes into behavior evidence from the notes provided. Context: Use this when manager feedback needs to become a lightweight behavior evidence scorecard without overclaiming impact. Working fields: - behavior - observable criteria - confidence - work example - support need - follow-up owner - evidence limit Example pattern: Field: Missing information Good answer: Name the specific information to confirm, who can confirm it, and why it affects the next decision. Rules: - Use only the source notes provided. - If information is missing, write "Needs confirmation". - Keep the output concise and reviewable. - End with the next best action. Source notes: [paste approved notes here] Output format: 1. Behavior evidence scorecard 2. Known facts 3. Assumptions 4. Missing information 5. Support patterns 6. Evidence limits 7. Recommended follow-up

### Microsoft 365 Copilot

Use goal, context, source, expectations, and output. For Obsidian context, use approved excerpts, Word summaries, OneDrive files, SharePoint pages, Teams context, or Outlook threads.

Goal: Help me make progress on Turn manager notes into behavior evidence. Context: Use this when manager feedback needs to become a lightweight behavior evidence scorecard without overclaiming impact. Source: Use the selected document, meeting notes, spreadsheet, email thread, SharePoint file, or pasted notes as the only source. Expectations: - Work with these fields: behavior, observable criteria, confidence, work example, support need, follow-up owner, evidence limit. - Mark uncertain items as "Needs confirmation". - Do not add facts that are not in the source. - Separate known facts, assumptions, missing information, risks, and next actions. - Summarize the top review questions for the team. Output: 1. Behavior evidence scorecard 2. Known facts 3. Assumptions 4. Missing information 5. Support patterns 6. Evidence limits 7. Recommended follow-up

### **What changed in the system**

The team stops treating manager feedback as a soft reaction score and starts using it as a lightweight behavior signal with clear limits.

### **Field test**

Use this on one program two weeks after launch. If managers cannot name the behavior or example, the measurement plan is still too far from the work.