LEARNING, UPGRADED SETUP GUIDE

Build a Manager Observation Form and Scorecard

Set up a lightweight manager observation capture and scorecard so behavior evidence can be collected without turning managers into researchers.

Try this one thing today

Choose one active program and write the behavior plus three observable criteria before building the form.

Use this when

- You need evidence beyond completion, but a full dashboard is not ready.
- Managers are already coaching the behavior, but nobody is capturing the signal consistently.
- A program needs one practical behavior check two weeks after launch.

What you should leave with

- A short capture form managers can complete in under five minutes.
- A scorecard table that separates behavior, criteria, confidence, work example, support need, owner, and evidence limit.
- A simple review rhythm that turns manager notes into a next action.

Manual setup

1. Choose one behavior from an active program. Keep it narrow enough that a manager can observe it in real work.
2. Write two or three observable criteria. Avoid traits like confident or engaged unless the behavior can be seen or heard.
3. Run a 10-minute manager huddle. Ask managers what example they would recognize if the behavior was happening.
4. Capture one note per person, team, or cohort with confidence, work example, support need, follow-up owner, and date.
5. Review the notes in two weeks and decide one support action.

Microsoft 365 setup

1. Create a Microsoft Form with the recommended fields below.

2. Send responses to Excel or connect them to Microsoft Lists if the team needs views, owners, and follow-up status.
3. Create a SharePoint page with the behavior definition, criteria, confidence scale, and examples of acceptable evidence.
4. Use filtered views for low confidence, high support need, missing work example, and follow-up owner.
5. Review the list during the program retro or manager enablement meeting.

Google Workspace setup

1. Create a Google Form from a Google Sheet so responses save directly into the scorecard spreadsheet.
2. Add data validation in Sheets for confidence, program, support need, and follow-up status.
3. Use filter views for program, confidence level, support need, and follow-up owner.
4. Link the Sheet from the program folder in Drive and keep the behavior definition in the first tab.
5. Review open support needs weekly until the launch stabilizes.

AI-assisted setup

Use AI to draft observable criteria, tighten rubric language, summarize approved manager notes, and find support patterns. Do not paste sensitive learner, employee, customer, or proprietary material unless the organization has approved the tool for that data.

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.

Recommended fields or columns

Program

The program, cohort, launch, or workflow being observed.

Behavior

The specific work action people should perform differently.

Observable criteria

Two or three visible signs a manager can check.

Confidence

Not yet, inconsistent, usually, or consistently.

Work example

One short example, artifact reference, or observed moment.

Support need

The job aid, coaching, source, workflow fix, or tool help that would improve the behavior.

Follow-up owner

The person who owns the next support action.

Evidence limit

What this observation does not prove.

Date

When the observation was captured.

Views or tabs to create

- By program or cohort.
- By confidence level.
- By support need.
- By follow-up owner.
- Missing work example.
- Ready for leader summary.

Ownership model

The L&D owner defines the behavior and scorecard. Managers provide observations. Learning operations maintains the tracker. The program owner decides which support actions happen next.

Maintenance rhythm

Review weekly for the first month after launch, then archive the form or move it into the program measurement rhythm. Do not let early observation forms become permanent clutter.

Common mistakes

- Asking managers for broad opinions instead of observable behavior.
- Using a five-point precision score when the evidence is still early.
- Reporting manager notes without an evidence limit.
- Collecting observations without a follow-up owner.
- Letting the form grow until managers stop using it.

Copy-ready setup checklist

Manager Observation Form and Scorecard Setup Behavior: Observable criteria: - - - Capture fields: - Program - Behavior - Observable criteria - Confidence: Not yet / Inconsistent / Usually / Consistently - Work example - Support need - Follow-up owner - Evidence limit - Date Review rhythm: - Review weekly for the first month. - Choose one support action from the pattern. - Report the evidence limit with the evidence.

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 Set up a manager observation scorecard for an L&D system problem. Goal: Help me turn the notes below into a practical next move. Context: Use this when an L&D team needs a lightweight manager observation system for behavior evidence. Use these working fields: program, behavior, observable criteria, confidence scale, 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. Form fields 2. Scorecard columns 3. Known facts 4. Assumptions 5. Missing information 6. Risks 7. Next setup actions

Claude 4 family

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

<context> I am working on Set up a manager observation scorecard for an L&D system problem. Use this when an L&D team needs a lightweight manager observation system for behavior evidence. </context> <source_notes> [paste approved notes here] </source_notes> <task> Turn the source notes into a practical next move using these working fields: program, behavior, observable criteria, confidence scale, 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. Form fields 2. Scorecard columns 3. Known facts 4. Assumptions 5. Missing information 6. Risks 7. Next setup actions </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 Set up a manager observation scorecard from the notes provided. Context: Use this when an L&D team needs a lightweight manager observation system for behavior evidence. Working fields: - program - behavior - observable criteria - confidence scale - 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. Form fields 2. Scorecard columns 3. Known facts 4. Assumptions 5. Missing information 6. Risks 7. Next setup actions

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 Set up a manager observation scorecard. Context: Use this when an L&D team needs a lightweight manager observation system for behavior evidence. Source: Use the selected document, meeting notes, spreadsheet, email thread, SharePoint file, or pasted notes as the only source. Expectations: - Work with these fields: program, behavior, observable criteria, confidence scale, 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. Form fields 2. Scorecard columns 3. Known facts 4. Assumptions 5. Missing information 6. Risks 7. Next setup actions

Sources behind this guide

Microsoft Lists: Create a list

https://support.microsoft.com/en-us/office/create-a-list-0d397414-d95f-41eb-addd-5e6eff41b083

Google Forms: View and manage responses in Sheets

https://support.google.com/docs/answer/6281888

Microsoft 365 Copilot prompting guidance

https://support.microsoft.com/en-us/topic/write-a-great-prompt-in-microsoft-365-copilot-7b614306-d5aa-4b62-8509-e46674a29165