

Guide to Preparing for a Performance Review

Performance appraisal. Annual review. This once-a-year process usually involves a self-assessment as well as feedback from a manager.

If this is your first appraisal at this company, find out how it's typically handled — and what it involves — either by asking co-workers or your manager.

If this is not your first review, get out your information from last year's evaluation. Prepare by:

- Reviewing the feedback and ratings you received
- Looking at the areas where you scored well last year
- Identifying the areas that needed improvement
- Reviewing your goals and plans from your last review — have you made progress? Have any of the priorities from the previous year's review changed?

Next, you'll want to come up with your list of activities, projects, and accomplishments since your last review. Be sure to quantify your accomplishments. Your manager may not be aware of everything you were working on, so preparing a brief summary is important. What does your manager need to know before he or she meets with you?

Also assemble any relevant documentation to showcase in your review:

- Letters or emails from customers, supervisors, co-workers, and/or vendors
- A list of any trainings you've completed
- Copies of any honors, awards, or recognition you've received since your last evaluation
- A summary of your professional development activities since your last review

Your manager may also ask you to prepare a self-assessment. Some companies provide a form for you to complete the self-assessment. Others may give you some open-ended questions.

The purpose of the self-assessment is to help your manager your perspective on your work performance and accomplishments. When responding to questions on the self-evaluation form, look at the list of activities, projects, and accomplishments you prepared and use that information to substantiate your responses. The self-evaluation form allows you the opportunity to provide additional insight about your contributions as part of the performance review process.

Even if your manager doesn't give you a formal self-assessment to complete, reviewing your own performance is a necessary part of preparing for your review.

As part of your self-assessment, you should identify areas for improvement or development during the review period (i.e., the next 12 months). These may include:

- Things you've struggled with
- Where you'd like to expand your skills, experience, and/or expertise

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- What you need — training, coaching, mentoring, a specific course (or degrees), special assessments, job shadowing, or volunteer work

As part of this exercise, you should also prepare your goals for the upcoming year. The goals should be specific assignments to participate in, learning objectives, or aligned with ongoing or future projects.

Your goals should be S.M.A.R.T.:

- **Specific:** A clearly defined outcome that you want to achieve
- **Measurable:** Using numbers, specify how you will measure and track your progress towards completion
- **Achievable:** You should stretch to reach the objective, but it should still be within reach
- **Realistic:** Consider the available resources you have (time, money, people)
- **Time-Sensitive:** Set a due date for the achievement of the goal

Another part of the assessment process may be a “peer evaluation,” where your co-workers are given the opportunity to provide input on your work performance.

What to Do with This Information

Ask your manager their preference — do they want to review the information before your meeting, or should you bring it with you to the meeting?

Questions to Ask in Your Review

Here is a brief list of questions to ask in your performance review:

- On a scale of 1 to 10, where 10 is someone about to be promoted, and 1 is someone about to be fired, what number would you rate me?
- How are you measuring my success in this position?
- What individual and company goals should I be focusing on?
- What aspects of my performance stand out?
- Which areas should I focus on for improving my performance?
- Can you provide me with specific examples of a time when my performance did not meet your expectations? How would you prefer I had handled that situation?

You may find that your boss sees situations from a different perspective, which can help you improve your performance, even if you don't think you handled a situation poorly. Because your boss is the person evaluating your performance, you want to make sure that your performance aligns with his or her expectations. If you disagree with the criticism, don't get into an argument about it. Instead, think about what you are hearing. If you are surprised by what is brought up, take the time to think through the situation instead of responding defensively during the performance review.

Remember that “perception is reality” when it comes to your performance. Determine whether this issue is something that could put your job in jeopardy or put a promotion and/or raise at risk. Ask your boss, “What can I do to improve this situation going forward?”

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How You'll Be Assessed

Most employee reviews provide a rating based on a scale from “Exceptional” (consistently exceeds all relevant performance standards) to “Needs Improvement” (consistently falls short of performance standards) across several areas — job knowledge, performance, communication, leadership, teamwork, customer service, quality of work, initiative, interpersonal skills, conflict resolution, ethics, etc.

This information can be used to determine your future responsibilities (and promotions), work relationships, and salary. “What gets measured gets managed,” so make sure your ratings accurately reflect your work performance. If you're unsure about a rating, ask for clarification.

What If You Have a Bad Performance Review?

If you are surprised by a negative performance review, especially if you feel that your review was not accurate — ask your boss if it would be possible to avoid having the review made part of your permanent record until you've had a chance to analyze the information in more detail. Is the information correct? Are there errors that need to be corrected?

If you previously had received positive performance reviews, assess what may have changed. Do you have a new boss? Has something in your personal situation changed that is affecting your job performance? In some cases, it may be a simple misunderstanding: You were focused on objectives that you thought were important, but your boss was measuring your performance based on a different standard. Getting clarity about how your performance will be assessed is critical to your future success with the company.

You can also ask your boss about the impact of the negative performance review. Is your job in jeopardy? (Will you be put on probation? Are there specific measures you need to meet by a certain deadline to rectify the deficiencies that were identified?) Make sure you are clear about next steps — what do you need to change or improve both immediately and in the future?

Ask to schedule a follow-up meeting — and set a specific date for that meeting. Continue to communicate with your manager about your progress towards fixing identified deficiencies. Also continue to track your activities, projects, and accomplishments.

Preparing for Your Next Performance Review

You should start preparing for your next performance review as soon as you complete your current review. Don't just file the paperwork away. Use it to guide your work. Review your objectives monthly to ensure you are on track for the expectations your boss established. If you had a poor review, make sure you are scheduling regular meetings with your boss to ensure you're on track to improving your performance.

If you haven't already, start a journal to track your performance. Develop a system to collect information from third parties — customers, co-workers, vendors, etc. that can be used in next year's performance review. When you have meetings with your boss between your annual

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performance reviews, be sure to take notes. As you think of things you want to ask about in your next meeting, write them in your journal so you can find them easily when it's time to meet.

Closing Thoughts

Whether the company has this process in place or not you should perform your own performance review. Having this information assembled prepares you for unexpected opportunities or promotions. Imagine being able to succinctly and confidently justify why you are the best candidate for a promotion or opportunity. You are the CEO of your career, manage it well.