

Preparing for Your Annual Performance Evaluation

Tips for getting the most out of your review

Performance management is a key to a successful career. The formal performance evaluation is a chance to reflect back on your accomplishments over the past year, recognize your achievements, and identify where you want to grow.

▪ **How your self-evaluation will be used**

Your self-evaluation is used as a starting point for a discussion with your manager. Submit it to your manager before meeting. After the conversation, your manager will complete the evaluation and upload it to the Performance App.

PREPARING FOR THE DOCUMENT & THE CONVERSATION

1 Create a list of *everything* you've done over the past year.

At this point, angle for quantity over quality—you'll refine the list later. List all the projects you contributed to, assignments you were given, things you learned, and challenges you encountered. This is easiest if you have been having regular performance conversations and can reflect back on your notes.

2 Add in the details.

Look for opportunities to make items on your list quantifiable. Associate your comments with numbers wherever possible (for example, "This project was completed 2 weeks early," or, "I met all requests within one business day."). If you remember feedback you may have been given along the way, be sure to note that, too.

3 Refine the list.

Remember: Your review is a time to showcase the highlights, not your comprehensive list. You will want to include the things for which you have data, and those you're most proud of. Be mindful of your team or manager's goals as well, and aim to include information about your contributions to those efforts.

4 Stay focused on you, and keep your remarks positive.

It's important to include challenges you encountered, but frame them positively. This [article](#) from Grammarly.com has great advice: Instead of saying, "I failed to reach several deadlines," try reframing it to, "Several missed deadlines helped me identify my time management challenges. I've started creating daily task lists to help me stay on track." Always show what you've done to address a problem.

5 Incorporate where you want to grow.

Think of any skills you want to build, or additional responsibilities you want to take on. Be sure to include these—you want at least one of your goals to be focused on your development.

6 Bring your full list to the performance conversation.

While you'll submit the evaluation ahead of time, plan to bring the full list you generated in step one to the conversation with your manager. There may be a time when having the information on hand is useful.



Acing the Conversation

How to say what you're thinking

Instead of...	Try saying...
“It was a team effort.”	“Thanks! With the help of the team, I was able to take this on and finish it well. I’m proud of this success.”
“It’s not my fault.”	“I appreciate your insight, and this is definitely something I will be mindful of. Now may not be the best time, but I’d like to discuss this in the future.”
“You didn’t tell me this,” or “You never said that.”	“I’m confused about x. Can you help me understand?” “At the time, I understood x. Where did I get mixed up?”
“You scored me too low here.”	“What would it take to score higher on this?”
“I don’t know what that means.”	“Can you tell me more about what you mean?” “I want to be sure I understand. I heard x; is that right?”
“You said x, but that’s not true.”	“I heard you say x, and it sounds like I may be thinking of this differently. Can we discuss this further?”
“I know.” Or, if you’re caught off guard...	“Thank you for sharing that.”
“I can’t do that alone.”	“Who can I partner with to make this happen?”
“I’m not good at that.”	“I’ve noticed x is becoming increasingly important in my role. I’d like to dedicate some time to developing my skills related to that. What do you suggest?” “I’m willing to do learn what it takes to take this on. Where do you think is a good place to start?”
“I missed some of my deadlines.”	“Several missed deadlines helped me identify my time management challenges. I’ve started creating a daily task list to help me stay on track.”
“You expect me to do too many things.”	“We discussed several things: x, x, and x. I want to be sure I’m focusing on the right priorities. Can we talk through which of these should be at the top of my list?”
“That goal is too vague.”	“I want to be sure I’m working toward improvement. How will I know I’m on track?”

