Planning for Your Performance Review

Many people feel uncomfortable candidly discussing their professional achievements and challenges with their managers. Hearing criticism about your professional skills, no matter how constructive, can be difficult. However, a performance appraisal is your opportunity to spotlight your achievements and make sure your hard work is recognized. Here are some ideas to help you make the most of your next review.

For specific information or answers about your company's policy on performance reviews, contact your company's human-resources manager.

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Goals of a Performance Review

While every company has a slightly different review process, the primary goals of an employee appraisal generally are similar. The purpose of the review is for you and your manager to look back at your accomplishments, compare them to your stated long- and short-term job objectives and participate in constructive feedback about your performance. Hopefully, your manager has kept you updated formally or informally on your progress throughout the year, so there should be no major surprises.

A performance appraisal should promote open discussion between the manager and employee. Both parties should have an opportunity to share ideas and concerns, celebrate achievements and discuss how the employee can continue to improve his or her skills. As a result, the manager and the employee can mutually identify any additional training the employee needs to continue to develop and improve skills. Some companies use the review discussion to map out the employee's new objectives for the year to come.

You should have a clear understanding of your goals even before you begin thinking about your performance review. These objectives should guide your day-to-day activities and help you prioritize your work.

Many companies follow a template for setting annual objectives and evaluating performance. In some companies, you may be asked to complete a self-evaluation. If your company does not have a defined process, ask your manager for specifics on how you should prepare for your review.

Take some time to reflect on your accomplishments for the year. Prepare a written summary highlighting your key successes against each of your job objectives. Be specific, and provide examples to illustrate key points. If you have gone above and beyond the requirements of your job, include the details in your written summary. Depending on your position, you also may quantify the impact your work has had on the company's performance, such as exceeding your area's sales goal by 10 percent or reducing by two weeks the amount of time to complete a team project.

Try to focus on the results, rather than the effort you expended. For example, say, "I was able to finish XYZ project on time and under budget, resulting in increased opportunity for the sales team and reduced cost for my department," rather than, "I spent over 60 hours working on this project and came in on the weekend, too."

Consider in advance what type of feedback would be helpful for you to do your job better. If you anticipate disagreement over whether you reached a particular goal, try to frame your responses in a positive manner rather than a defensive one. Planning ahead will help you organize your thoughts so you can present yourself professionally.

Participating in Your Review

Here are some suggestions to help you get the most out of the meeting. Bear in mind that each company's review process is unique and these are general comments:

- Be open to your manager's suggestions. Approach the discussion with an open mind, and listen objectively to your supervisor's comments. Hopefully, your manager will let you know what you did well in addition to giving you suggestions about how you can improve. Remember that every performance review should contain both positive feedback and suggestions for improvement.
• Make sure you understand your performance rating. In order to move forward in your career, you will need to understand how and on what criteria your manager evaluates your performance. Ask for clarification if your manager's comments are vague. Ask your manager to give you an example of an action that prompted his or her positive or negative feedback.

• Share your ideas. Even if you feel anxious, try to participate in the conversation. If you have ideas about how you can improve your performance, offer them. Your review can be a good place to discuss any concerns or questions you have about your work. If you feel an aspect of your review is inaccurate, ask for examples that illustrate why your manager feels this way or note that you disagree with a particular comment. Some companies encourage "360 reviews," in which you assess your manager's performance as it relates to your goals. Even if it is not an official part of the process, it can be helpful to let your manager know what sort of coaching worked best for you during the year.

• Keep a copy of your review. The goal of giving feedback is to help you continue to improve your performance. Make sure you have a copy of your review to which you can refer throughout the following year. It also can help to refresh your memory when it comes time to write next year's review.

What to Do When You Disagree

Hopefully, both you and your manager will have similar impressions of the quality of your work. There may be times where you disagree with your manager's assessment. Consider the following suggestions to help resolve these differences:

• Ask for some time to read your review. It is easy to be overly sensitive to criticism, especially when you first hear it in such a high-pressure setting. It is often best to sleep on it before responding, especially if you are upset by some of the material presented. Ask for a few days to think about your review and schedule a follow-up meeting.

• Decide whether you feel your manager's criticism is inaccurate. Calmly reflect on what was said, and compare it to your own recollection of your performance. Focus on the facts, not feelings.

• Prepare a response if you truly feel that your manager's comments do not reflect your real performance. Try to provide specific written examples to illustrate your point of view. If your company has a defined performance-management process, ask what steps are available to you when you disagree with your review.

• Present your concerns to your manager. Strive to approach the conversation professionally while calmly discussing why you disagree with his or her assessment. Your manager may come to agree with you but may decide to let the original performance rating stand. At some companies, it may be possible to meet with a human-resources manager to discuss your review if you are not able to come to a consensus with your manager.

A performance review gives you the opportunity to discuss your employment goals and make plans for your career growth. As you go through your review, seek to demonstrate your professionalism and ability to work as part of a team. Even if you do not agree with every detail, by successfully navigating your performance assessment you can illustrate to your manager your value as an employee.

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