



## Performance Reviews - Employee Self-Review & Development Tool

At work, you may have to give yourself a rating before a formal performance review. Or maybe you want to set yourself up for a promotion, or even a new role outside your organization. It can be hard to think back and remember everything months later. You can use this throughout a year to take notes and set yourself up for review, promotion or application time.

### Career Goals

Current role:

Ideal next role:

Skills needed for next role:

Steps taken toward development (project, shadow, research, external):

### Compensation

Current compensation:

Additional aspects (bonus, etc.):

Market - examples of similar roles (using research or ranges in job postings):

Differences in your contributions since hired/last increase (project ownership, new skills, etc.):

### Key Projects/Tasks (Copy and Paste Additional Ones)

*When you discuss projects or tasks you completed (whether internally or externally), you will often be asked or assessed on their importance, your role, whether/how you worked with others, what challenges came up (and how you handled them), the impact and feedback received. Taking notes during the year can be incredibly helpful. Be specific below - from number of individuals to impact (including \$ amounts or otherwise - e.g., "cut time for agreements to go through compliance by 50% by aligning on compromise language at the outset."). Focus on positives, rather than blaming others (e.g., "when key colleague left company midway through the project, I proactively completed a knowledge transfer with them and delegated to others/involved a new team member to ensure deadlines were still met.")*

#### Project:

Date:

Others involved (Name & Function):

Topic:

Goal:

Timeline:

Impact:

What challenges came up:

How you worked through those:

Did you "manage" others (even if not formally):

Impact when it was completed:

Feedback from others:



**Project:**

Date:  
Others involved (Name & Function):  
Topic:  
Goal:  
Timeline:  
Impact:  
What challenges came up:  
How you worked through those:  
Did you "manage" others (even if not formally):  
Impact when it was completed:  
Feedback from others:

**Project:**

Date:  
Others involved (Name & Function):  
Topic:  
Goal:  
Timeline:  
Impact:  
What challenges came up:  
How you worked through those:  
Did you "manage" others (even if not formally):  
Impact when it was completed:  
Feedback from others:

**Project:**

Date:  
Others involved (Name & Function):  
Topic:  
Goal:  
Timeline:  
Impact:  
What challenges came up:  
How you worked through those:  
Did you "manage" others (even if not formally):  
Impact when it was completed:



## Keep in Mind

- **Help Them Help You:** Your manager (and their own leadership) likely receive requests from multiple employees. Frame your talking points to make their life easier, by showing the value you've brought since your last review/compensation adjustment. Example words are: "I know you likely get a lot of requests, and I want to put everything together to make your life easier in showing how I'm adding more value than I was a year ago [or other timeframe]."
- **How to Stand Out:** While reviews and pay increases often have "recency bias" (meaning that, even for 'annual reviews' they can often be affected by things that happened most recently), many managers think about how employees act outside of the review process. Example actions are: showing up for 1:1s prepared, speaking up in team meetings in ways that add value (giving ideas or next steps), meeting or beating deadlines you've promised and helping other members of the team in their work.
- **Show Them You're In It:** Many managers fear that they will get an employee a pay increase... and the employee leaves soon after. Nothing is guaranteed, but if you want to stay for the long haul, be honest with them. Example words are: "I want to build a career here, and I want the value I add to keep increasing as I do so. I appreciate being recognized in doing so."
- **Growth:** In the conversation, part of asking for feedback is also looking around the corner. If you are interested in new skills or projects, speak up. The saying, "the squeaky wheel gets the grease," is often true. Example words are: "In addition to the review, I want to keep developing. I'd like to work on [insert] - can we plan on talking about ways I can do that to develop and add even more value?"
- **Thank Them:** You never *have* to thank your manager for giving you a review or seeking higher compensation for you. But just like employees often feel like work is thankless, managers do, too. It's not always easy for them to push for ratings or compensation. Showing appreciation (and them doing so for you) can make the workplace more pleasant. Example words are: "I know work is 'work,' but I appreciate the feedback you give me, and how you push for us to be recognized and compensated."

You've got this. Be confident and clear to control what you can (making the best case possible)!

## Want More Tips?

Manager Method provides training and tools to better empower managers and employees. Founded by Ashley Herd, a legal and HR leader from McKinsey and Yum! Brands and popular LinkedIn Learning instructor, you can be confident in our training and solutions for your organization.

Our Employee Mini courses help you with tips from asking for help at work, to handling conflict (even with your boss) via videos with Resource Guides. **To learn more, go here and scroll to Employee Minis:** <https://www.managermethod.com/resources>

