

# 5 essential questions to prepare for your review

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Too often, performance reviews spark dread for everyone. Some managers view them as an extra pile of administrative work and rush through them half-heartedly. And many team members cringe as they try to sum up a year of hard work in a generic self-evaluation and fear a surprise low score from their bosses.

But you're more than a 1 to 5 rating in four dimensions—and a little preparation can help you be sure that your manager understands your true value (or even why you deserve a raise or promotion). Start by considering these questions—and including specific examples in each area to illustrate your impact.



## 1. How well did I accomplish my goals—and what impact did I make?

A lot can happen in a year—projects start and end, teams pivot, plans change. Does your manager remember how you've met or exceeded your goals and been indispensable? Do you?

Look back through wherever you track your work (e.g., your inbox, notes, calendar, etc.) to list your main accomplishments over the past year. (And start a running list of achievements now to keep track for next year's review.)

Pare down your list to the areas where your work made the biggest impact for your team or company and the areas your manager cares a lot about—after all, they're the judge and jury in your review.

For each achievement, describe what you set out to do, what happened, and the difference it made in terms of quality, efficiency, or some other factor important to your work, team, or company. If your goal can be quantified, share the numbers (e.g., “*My goal was to boost readership by 25 percent, and I increased it by 40 percent*” or “*I had a stretch goal of selling 1,000 copies and I met it*”), but if not, that's OK—impact isn't always about the numbers.

For example:

“My aim was to rewrite our volunteer guidelines to make them shorter and clearer. I cut them from 15 pages to four. I used to get questions from volunteers about once a day, but now it's about once a week. Not only are the guidelines less confusing for volunteers but getting fewer questions saves me time, too.”

And if you think your manager isn't personally invested in an important goal of yours, consider framing your achievement in a way that shows how your work benefited your manager or enabled the team to take on something else.

For example:

“I handled project X entirely—from initial concept through client delivery—which let you and others focus on our new initiative.”

## 2. How did my collaboration with others make an impact?

Maybe you saved a colleague time by removing a roadblock or taught your team a skill that they put to good use. Explaining these contributions shows your boss that you’re a team player who cares about the greater good, not just your personal collection of gold stars.

Self-review forms often ask how you demonstrated teamwork or collaboration, so it’s worth gathering examples. Even if some come to mind, reach out to colleagues for whom you think you’ve made a difference. You’ll gather better details and be able to craft a more compelling story—and you just may learn that you helped in ways you didn’t even realize.

Ask questions like *“How have I helped you meet your goals?”* and *“How has my work or contribution made a difference for you?”* Then, ask if you can cite them when you talk to your manager so their testimonials add weight to your case.

For example:

“When the legal team was stretched thin working on their biggest cases of the year, I helped them finish their backlog of briefs in just two weeks. Franklin said that they would not have met the court’s filing deadline without me.”

## 3. How have I gone above and beyond my job description?

Maybe you stepped up to lead your team’s Big New Initiative. Or, you filled the void left by a key team member’s departure by taking on one of their responsibilities. Your manager may have been thrilled to get the problem solved, but don’t expect them to remember at review time that your new duty is a level up from what you previously handled. Remind them. You’ll demonstrate your commitment to personal growth and team success—and show evidence that you’re on a path toward a promotion.

Include in your explanation:

- How the work you’re doing now goes beyond what you were doing before (e.g., *“I’m a junior sales associate, but I consistently manage accounts the size of those senior sales associates typically handle”*)
- How long you’ve been doing this new work (e.g., *“I’ve been managing these larger accounts for eight months”*)
- The impact of your contributions (e.g., *“I’ve brought in \$50,000 more than my junior associate-level quota—and the team avoided having to hire a new senior staff member”*)

## 4. How did I respond to the challenges I faced?

It’s one thing to tell your manager “I’m a resilient, adaptable, problem-solver!” but another to vividly show them. Crafting a narrative about obstacles that made it difficult or impossible for you to meet a goal is particularly important. What you say can help you shift your boss’s perception from “Yikes, that was bad” to “Wow, I’m impressed by how you handled that”—even if you don’t have exciting stats to back you up.

Walk your manager through the challenges you faced: What was harder or different from what you expected? What were the steps you took or the sacrifices you made to overcome the challenges or make the

best of the situation? What was the outcome and how could it have been different if you hadn't stepped up?

For example:

“When production delays on another team caused our group to fall behind on project X, I was able to shift some of my tasks so I could spend more time on it. I worked a few late nights, but in the end, we delivered everything the client asked for—and we didn't jeopardize the client relationship by missing our deadline.”

But what if it was your misjudgment—not an external force—that led to a setback or failure? Proactively bringing it up shows that you're self-aware and gives you a chance to focus the story on lessons learned for next time.

For example:

“I underestimated how long this renovation would take, which led to cost overruns. In the future, I will talk to the on-site contractors to help me set a more realistic timeline and to hire additional help earlier in the process.”

## **5. How did I use redirecting feedback I received to improve?**

Chances are, you know of a few areas where you need to improve (you and your manager may have discussed them). So, don't wait for your manager to tick off the list of “areas for improvement” during your review. Get ahead of the story so you can say, “Look at everything I've done to get better at X!”

Point out how you've improved in ways your manager may not know. And you could admit what you still need to improve, which shows that you're not trying to highlight the positives and ignore the negatives—which lends credibility to everything else you've said in your review.

Explain the specific feedback you received, the steps you took to address it, what you learned from the process, and what you will continue to do to improve.

For example:

“I've received feedback that my emails can come across as rude or demanding. So, I've been adding more courteous language, and I've asked some of my teammates for feedback on specific messages. I've learned that how you approach people in writing is really important for building strong working relationships.”

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