



# REVIEW PLAYBOOK

YOUR WINNING STRATEGY

## INTRODUCTION



Year-end reviews serve as a crucial, albeit potentially stressful, process that is necessary for personal and professional growth. This process provides a valuable opportunity for you, your supervisor, and possibly other stakeholders, like your skip-level boss or HR, to reflect on the year's accomplishments, celebrate successes, and receive constructive feedback to aid your development.

It's important to note that there should be no surprises during this exchange of information. Effective, open communication should ideally occur throughout the year. However, if it hasn't, now is your chance to approach the review in an organized, confident, and open manner, demonstrating your value to the company.

As you prepare for the review season, consider these key points:

- Organize your thoughts.
- Quantify your achievements.
- Self-assess your performance.
- Actively seek feedback.
- Maintain an open-minded approach.
- Approach the review with a positive attitude.
- Share your career aspirations.
- Listen attentively to the feedback provided.
- Plan for your professional development.



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## TIPS FROM AN EXECUTIVE



It's important to take pride in your accomplishments AND it's crucial to remember that your boss prioritizes ensuring the company's profitability and looking good to their superiors. As someone who has conducted and observed hundreds of reviews over the years, here are some insider tips and thoughts your boss likely has:

- Where did you add value to the company? Think about the bottom line.
- Your boss has a lot more on their plate than just you, so make sure you clearly communicate the value you bring.
- Do not read your responses word for word; they have likely already skimmed through them or are reading ahead.
- You don't need to cover every single bullet point; focus on the most significant highlights.
- Think outside of the box; your peers may be sharing the same general information.

It's tempting to go over everything you've accomplished. It's understandable that you want to showcase your value and be proud of your achievements, but overloading your boss with information can be exhausting for them. They want to know:

- What have you contributed to the team?
- What is your impact on the company?
- Can you see the bigger picture beyond your current role?



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## RECEIVING THE FEEDBACK



During the review process, it is essential to be open to the feedback your boss provides, even if you may not agree with it or like it.

Here are some tips on receiving the feedback:

- Practice deep breathing to stay calm and composed.
- Listen actively to understand, rather than immediately defending yourself.
- Take notes while your boss provides feedback, and don't hesitate to ask for clarification or repeat if needed.
- Request examples and inquire about how they would prefer tasks to be handled in the future.
- After your review, take some time to process the feedback. You can categorize it as follows:
  - Feedback you agree with: Determine how you can make the necessary adjustments.
  - Feedback you question: If you have doubts, don't hesitate to seek further clarification.
    - Is this feedback a recurring theme from various sources? If so, it's likely something you should seriously consider changing, especially if you intend to stay with the company.
    - If the feedback remains unclear even after processing, consider requesting a brief follow-up meeting for clarification.
  - Feedback you're hesitant to act on: Be cautious when dismissing feedback.
    - Does it clash with your core values? If it does, it's a more substantial issue to address than a matter of personal preference.
    - If it doesn't conflict with your values, remain open-minded and try to see it from their perspective.



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## CHECKLIST



This list will have you feeling prepared and ready for a productive conversation!

- Maintain a year-round collection of your work achievements
- Go beyond the items from your To-Do List, think of additional contributions
- Prepare talking points to stay on track during conversations
- Support your achievements with meaningful, bottom-line data
- Categorize your accomplishments into three organized groups
- Rehearse your talking points before the meeting
- Inquire about your boss's priorities
- Offer constructive feedback to your boss for improved job performance
- Acknowledge and commend team members
- Keep a record of commendations from team members and customers
- Share your goals for the upcoming year
- Discuss your future and potential value with your boss
- Highlight contributions beyond your job description, such as mentoring and project involvement
- Share your personal development plans, including courses and books for skill enhancement