



# Performance Review Checklist



It's that time of year.....evaluating your performance, discussing your achievements, your career and making plans for the year ahead. It's crucial to prepare yourself for this review meeting. Just knowing if you've achieved your KPI's for the year, is just not enough. Just thinking you have put in a ridiculous amount of hours – you'll be a 'shoe-in' for your bonus and/or promotion, is just not the case. Get crystal clear on your career aspirations. Yes, know your KPI achievements but walking into your review with the below under your belt will set you up for a successful, productive and effective review, contributing to the organization.....importantly standing in your own power and driving your career and how you want to feel at work!



- Be prepared! Outline your achievements, particularly if you feel you have achieved over and above your set KPI's and completed other projects / task throughout the year
- Prepare your comments on how you have displayed and acted with Company values
- Current Key Performance Indicators – have they been achieved?
- Colleague and staff relationships. How do you view your Business Partnering skills
- If a 6 month review was conducted, do you feel that was a beneficial exercise to keep you on track. What have been your key achievements in the last 6 months
- Did you feel supported from your manager throughout the year to complete your goals
- Your team management and engagement – do you feel this has been a success for you over the last year. What were your key takeaways from the year
- What areas of your role or relationships with stakeholders are you struggling with? What do you think you could do differently?
- Importantly – how did you feel going to work every day.....how would you like to feel in the future. Do you have fun at work?
- Did you do any professional development throughout the year. How did this training add to your skill set?



- If you've had a mentor throughout the year, how successful has this relationship been for you and for them. Are there any changes you'd like implement for future?
- If your organization ties in remuneration to your review, what bonus achievements to you meet or perhaps increase for over and above, outstanding achievements
- Did you receive any awards for appreciation or achievement?
- Do you look back on the year with a sense of satisfaction? Do you feel you achieved, according to your standards, values, expectations and needs for your career?

## The Year Ahead

- List the goals you'd like to achieve in the next year. How do these goals add value to the organization, add to your skill set and development?
- Know your career aspirations, where do you want to be in 12 months, 2 years and 5 years. Do you have your sights set on taking on your boss's role one day? What do you need to do to get there? (and it's not just longer hours and grind!!!)



- What professional development would you like to do in the coming year.
- How does this development relate to your current role or contribute to your future career plans?
- What support, help, guidance, training, mentoring do you want from your manager in the coming year
- Would you like to continue your mentor relationship? What are the goals for this relationship for the year ahead
- Consider if you would you like to mentor a staff member in the next 12 months
- What are your leadership goals?
- What steps will you take towards work / life balance
- How can you introduce more fun to your team and tasks?
- How will you set out to ensure you are displaying Company values?
- Be crystal clear on your 'Why', know why you are going to work each day



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