

Winning the Performance Review

Why Do You Need to “Win” the Review?	2
For You - Your Goals?	2
End Goal	2
Performance Goals	3
Cheerleaders	3
Barriers	3
For Them - Objectives	3
Write them down	3
SMART	4
OKR	4
How Often?	4
How Many?	4
Timeline Spread	5
Types	5
The day-to-day	5
As a Leader	6
Examples	6
Example 1 - Delivery	6
Example 2 - Personal	7
Agreeing Awesome	7
Evidence	8
Weekly Wins	8
Monthly Roundup	8
Feedback	9
Personal Notes	9
Public Shout Outs	9
Stumbling Blocks	9
Vagueness? - What	9
Lost in the Shuffle - Have You Done	10
Personal Bias - For Me	10
Recency Bias - Lately	11
Ch-ch-ch-changes	11
Wrapping Up	12

Why Do You Need to “Win” the Review?

Performance Review season is a crushing familiarity to far too many people in the corporate world. If you are lucky, it's part of an ongoing development conversation. If you aren't, it's a few weeks of misery once a year that's equally despised on all sides of the conversation.

All too often this means any review is a waste of time, where bad managers give random ratings based on a range of biases, rather than the awesome things you've achieved over the year.

To save you from these bad experiences, this guide will teach you a set of techniques to ace the review and put it to work for you.

We'll look at how you set your own goals and recognise what will help you achieve them. You'll then see how to convert them into powerful public objectives, which put you ahead of the performance curve.

You will understand why it's important to document expectations ahead of time, and we'll cover techniques to gather evidence for your impact.

Finally, we'll cover what might go wrong, and how to recover from the most common mis-steps.

Bring these techniques together, and I'm certain your next review will be a massive improvement, you'll get the recognition you deserve for your efforts, and it'll actively benefit your future growth and personal development.

For You - Your Goals?

You identify your goals to help you understand what you want to achieve, and why that is valuable to you. They give you the framework to win your performance review, to get the recognition you deserve.

If you are clear on your goals, then you can shape the efforts you undertake on a day-to-day basis. You can be clear when you are doing well and should keep working in that manner, or clear when you aren't and should change your approach.

End Goal

This is for you, and only you. It's the thing that you really want to achieve.

Maybe you want to grow your span of control, gain a promotion or launch an exciting new product. You might be seeking job security, or finding a way to stabilise your current role to enable you to focus on other aspects of your life.

Your end goal may well be something that you don't have direct control over, but don't stop yourself from putting this goal in place.

Performance Goals

Once you have your end goal, you can put together your performance goals. These are things that you do have control over, and should be the things that put you in the best position to achieve your End Goal.

Think about things you can influence, or that you are able to impact by your actions. Improving them, completing them or over-achieving in these areas are all really good things to consider as performance goals.

These will also be good things to consider when setting your public objectives, as there's likely a formulation that allows you to align your private goals with the objectives you share more widely.

Cheerleaders

Identify the people who want you to succeed. That might be your friends, it may be people in your department or area or it may be allies of convenience whose goals align by chance.

These people will be your supporters. They'll provide valuable feedback and be able to influence to help you achieve your goals. They'll also be early warning signals for when things aren't going so well, so you can get back on track quickly.

Treat them well and support their own endeavours to keep the relationship strong.

Barriers

Give a fair and frank accounting of the barriers that may get in your way. Are there people who don't want you to succeed? Is there a difficult project that could drag you down, or a lack of resources that will stop you achieving the goals you desire?

Most barriers can be mitigated by planning ahead. Things that you don't see coming will trip you up or stop you dead in your tracks.

The better you can see what's going to slow you down, the better you will do.

For Them - Objectives

Write them down

Setting Objectives and writing them down makes it a lot more likely that you'll go out and achieve your goals. It also means you'll be really well set-up with a history of what you were

aiming at, and it'll be a great thing to frame your conversations about agreeing what awesome looked like when you hit your review.

There's lots of buzzwords and acronyms in the objective setting world, which can make it hard to understand how to set an effective objective and how to tell if you've actually achieved it.

We'll have a look at a couple of the most useful and common ones, which you can then adapt to other models if needed. SMART is a method to capture great objectives, and the OKR framework, which is a way to connect goals from the personal to organisational level.

SMART

You need to pick a way to formulate your personal objectives, and it's really useful to make sure that they are SMART:

- S - Specific
- M - Measurable
- A - Achievable
- R - Relevant
- T - Timebound

If you refine your objectives to meet this criteria, then it'll be very easy to tell if you have successfully achieved them.

OKR

Objective / Key Result is a good way to frame SMART objectives. You create a single narrative statement (the Objective) and pair it with some number of Specific Outcomes (out Key Results). A good OKR will be formulated in such a way that you can consider the Objective complete by hitting each of the Key Result values.

There's a lot more to OKRs than this thirty word explanation, but it's enough to get you started thinking in this style.

How Often?

No matter the duration of your performance review cycle, you should aim to review your objectives on a quarterly cycle. That's long enough to set some challenging goals, but not so long they'll fall out of date with changes to the organisation.

Check in on progress towards them every week or fortnight. You can do this privately, or use them to frame some of your 1-2-1 conversations.

How Many?

A good number of objectives to aim for is 3-5. Having more than this means you won't give them enough focus, having fewer means you probably won't be stretching yourself enough.

Timeline Spread

Try and set objectives that spread across multiple durations. Three, six and twelve months are all good options, but don't be constrained to them if it makes sense to go for other times.

It's great to have at least one short term and one long term goal.

Don't align every objective to the review cycle duration. This usually leads to rushing to tick items off as the review deadline approaches. Instead, it's much better to bank some big wins throughout the period, and use these different time horizons to help you get that focus.

Types

There are a few different types of objectives that are worth considering when you are building out your set of goals and thinking about your development options:

1. Delivery focused - Getting something significant shipped, solving a core business problem.
2. Job Skills focused - Learning a new technology or process, updating solutions to newer versions.
3. Team focused - Improving team ways of working, removing impediments to getting work done, improving overall collaboration
4. Personal development focused - Training and certification, public speaking, organising an event, mentoring juniors.

These tend to be in rough order of time horizon. Delivery focused will cluster to the shorter timescales, personal development goals may tend to longer periods and team or job skills will sit in the middle.

Delivery type objectives are often on shorter timelines as we regularly adapt our focus and review how we will achieve outcomes. It's sensible to consider these objectives in line with your organisation's planning cycle, as that's a great view of what your area of department is aiming to achieve in the near term.

It's generally useful to have a spread of objectives across the different types.

The day-to-day

Objectives are stretchy, and should be pushing you forwards. They might feel a bit uncomfortable.

They are additional to achieving your day-to-day responsibilities, use them as the tools you'll use to secure a great review and achieve your goals. Look for opportunities to go beyond where you are now, to push into the learning zone and have a greater impact in your roles.

As a Leader

When you are directly responsible for getting the work done, setting objectives can be pretty easy. It's simple to tell if you completed the tasks and had the direct impact you wanted. It can be a bit tougher to frame the objective if you are only doing part of the work, but it's still a relatively easy problem to solve.

As a leader, and as you reach higher levels of leadership, it gets tougher.

You need to scope your objectives to a higher level of impact, and they need to be formulated in a way that makes sense in the wider context.

So instead of stating what you are directly doing, you may need to set a delivery objective about the overall impact of your team or department. You move further from what might be done, and closer to the overall impact.

Some of your objectives will also benefit from not being about you. As a leader one of your key jobs is growing people you are responsible for, so it's really powerful to set some objectives around ensuring their success.

This also means that some of your objectives will be harder to measure. Look at opportunities to collect feedback from a range of sources. If it's soft skill related, then the measurement will need to be soft skill driven.

Examples

Let's have a look at some examples of less than stellar objectives, and how they can be turned into much more effective statements that will set you up for a great review.

Example 1 - Delivery

We're going to launch a brand new product

This is pretty much a miss in every measure on the good objective scale. It's not clear on the contribution you will make, it's unbounded in time and it's got no view of the impact this product will have. It's hard to tell if this is great work, or just doing the bare minimum expected in your role.

I'm going to lead the delivery of a brand new product to our European market by the end of H1. It will convert over 1 million customers to new subscriptions by the end of the year.

This is much better. It's more specific, it's time bound, and it's linked to outcomes that the business will recognise. You'll know if you've been successful or not, and you'll be able to set some checkpoints on the way that give you a chance to course correct well before the review season comes around.

Example 2 - Personal

I want to get better at public speaking

This is basically the archetypal bad personal objective. What does better mean? What about public speaking? Do you want to speak to large groups at conferences, or get better at presenting your three month plan to your immediate group. Different skills, different ways to practice and different ways to measure success. You need to put some thought into the details, and use that to shape your objective.

I want to get confident at presenting to small meet-up groups of around 50 people. In the next six months I will:

- 1. Take the public speaking training offered by our Corporate Comms team*
- 2. Join our speaker guild and participate in at least three practice speaking sessions*
- 3. Present a talk at an internal knowledge sharing event*
- 4. Take this talk and present to at least two external user groups*

This is so much better. It's specific to the mid-sized audience rather than broad and amorphous. There are several stages outlined, going from simple training, to internal speaking to the external groups. That gives a good way to check-in on progression, and also lets you ladder up from easy tasks to more complex ones. At the end of this, if you've ticked all the boxes, then you'll know you've improved your public speaking, and be able to show strong evidence of that journey.

Agreeing Awesome

It's really important to have a great view on what awesome looks like. If the reviews that you do have an 'Exceeds Expectations', then you must understand what those expectations look like as soon as possible.

Even better is when you are able to understand what exceeding them looks like.

The power move is to get this documented early in the performance cycle. It's very easy to minimise achievements after they've been achieved if the bar was not previously set.

Depending on your role, exceeding might look like a wide range of things. Maybe it's just doing more, selling more or finishing more. Possibly it's growing your control, maybe leading two teams effectively when you were previously leading one. Maybe it's doing some major work outside the day-to-day, putting in place new policies or procedures that have impact across your wider department or company.

Even these are a bit vague. What does 'leading effectively' mean? Can you be clearer on that expectation? Is it delivering on agreed timescales, or is it helping people in those teams achieve their own personal development goals?

Your objectives are your most useful shared understanding of what expectations can look like, as it's something that you've captured in concert with the person who'll be responsible for your end of year review.

Depending on your organisation, achieving them may be considered to be "meeting expectations", or they may be stretching enough to be considered "exceeding", again be clear and write it down. If they are stretch goals, record them as such.

To make sure you are building agreement, ask what your reviewer thinks of the objectives. Work with them to state the outcomes in a way that resonates with both of you. This will help you phrase the expectations in day-to-day terms, and also highlight the exceptional as worthy of extra recognition.

Once your objectives are set, you want it recorded in a paper trail. Ideally your reviewer would write out the agreement you've made, but don't be afraid to take things into your own hands if needed. For example, you might send an email that states "Here are my objectives that we recently discussed and agreed, I expect to successfully complete them in the given timeframe. My stretch goals are over and above these core objectives, and they are listed below".

Evidence

Weekly Wins

Record your successes every week. Write out the things that have gone well and helped you get closer to achieving those objectives. This record is a great source of information when you are building any review documents. It'll help you recall important events and make sure that you tell the full story of your achievements.

Monthly Roundup

Each month, roll the weekly summary up into a roundup, covering the most significant highlights. You'll need to be judicious in choosing your highlights for an annual review. Pick several per objective, making sure to cover each of the key result statements. Spread out the points over the time period, to make sure it doesn't look like you are either resting on your laurels from early in the year, nor phoning it in for most of the period and throwing a final push in the last month.

For an important review, if the monthly highlights feel sparse, drop back to the weekly summaries to promote a few other points if you need them to get you over the line.

Feedback

Personal Notes

A lot of the weight can be added to your performance by incorporating the personal feedback of people you've worked with. People outside of your immediate team are especially valuable, as that shows you have a wide ranging impact.

Actively ask for feedback, lots of people are willing to share their thoughts, and it's a great way to find out about the progress towards some harder to measure personal goals. The closer to the particular moment you can seek feedback the more likely you'll get useful information, so don't wait until the review season to go looking.

All feedback is useful, but you won't necessarily see the value of it immediately, especially if it's complex, or not something you agree with. You don't need to take action on every piece of feedback you've been given, but do take the time to reflect, understand and consciously decide what you'll do.

Finally, feedback can be tough for some people to give, so make it easy. Be gracious with them when they share their thoughts, and you'll be much more likely to get more in the future.

Public Shout Outs

Top evidence for your review is call outs that are made in larger settings. Look out for department or company all hands, and any other significant public announcements.

When you do something great, try and get this added to the agenda of these sessions. Figure out the process to be included, and get as many of your milestones recognised as possible.

When you get these call outs, record them and put them into your weekly and monthly summaries. The social proof of recognition is a powerful piece of evidence for your review. If very senior company people say that something was a great piece of work, it's likely that your reviewer will agree.

Stumbling Blocks

The most common ways to lose your review will be if you don't have a slam-dunk answer to "What have you done for me recently?". Answer it well and it'll put you into a great position.

Vagueness? - What

The problem here is that something was too vague, most often the definition of expectations. That means you are totally unable to show that you've exceeded those expectations, so are stuck with a middling rating.

Overwhelm this by getting really detailed when agreeing what awesome looks like. Set some expectations around what exceeding expectations looks like, and get it documented.

This set of vague expectations often shows up in settings where there's an expected curve of review results, so only a few people can be Excellent. Watch out for mid-point check-ins that boil down to "Keep doing what you are doing", that's setup for a vague outcome.

If you're deep in the performance cycle and recognise this is about to hit you, then one approach is to compare your achievement to your peers. It's difficult to pull off well, but if only one person is going to be recorded as Awesome, you need to make your case for it being you.

Question earnestly in this situation. Ask the person doing your review what they consider to be significant achievements in the year, then highlight your input in those areas. Getting specific now is the way to combat the vagueness, so go heavy on detail.

Lost in the Shuffle - Have You Done

When you overuse 'we', then you risk your achievements being lost in the noise of the wider group. This is especially risky for people who've recently moved into leadership positions and who aren't yet used to highlighting their impact on the course of events.

To combat this, look for weak statements, and strengthen them to highlight the work that you did. For this to be successful, you don't want to take away from the work of the team, that's selfish and unlikely to be true. What you are aiming for is to show your specific actions.

So rather than stating "The team launched a brilliant new product", you would state "I led the team, engaged early with marketing to plan the comms strategy, and empowered the team to launch the brilliant new product with a coherent marketing strategy". The more specific you can be here, the better.

When you are in the what, it's your chance to highlight the business impact of the work you've been involved in, commercial acumen is highly regarded as you progress to higher levels of leadership, so showing it early is great.

That means we strengthen the statement even more to something like "Led the design of the brilliant new product, increasing revenue by X% in Y months".

Personal Bias - For Me

It's a sad fact, but you'll get better reviews if you can tie up the great work that you've been doing to the interests of the person who'll be reviewing your efforts. If they are a technologist, then highlighting performance improvements will likely go down well.

If they are more people focused, then being clear how you've helped people you work with grow will be looked on well.

A really great view on what your reviewer will care about is their own objectives. If you can find out what these are and dovetail yours to theirs, it will jump you ahead of anyone working towards divergent goals.

Don't go all in on this. Remember your wider organisational performance measures. It's likely that your rating will be moderated in some way, either by other leaders or by your HR reps. When you are doing your alignment, structure your review docs to start with the things your reviewer cares about, then make sure to still include the rest towards the end to make sure you've covered all the bases.

Recency Bias - Lately

The further apart your review cycle runs, the more likely that you'll run into recency problems,

It's a lot easier to remember what happened in the last month than in the first month of the year. This is why we collect relevant evidence as we go through the year, it builds the foundations of a great review.

If you've not been doing this, then you need to go into detective mode. Search out emails, documents and even chat conversations to rebuild the period, and use that to structure the review. You should only ever have to do this once, while you are switching to collecting evidence for the next cycle.

Ch-ch-changes

Watch out for changes in direction that can make your stated objectives invalid. There might be a sudden new project that shifts your other work around. Maybe someone leaves and you step in to cover their role. All sorts of things can happen that make a stretch goal into an impossibility.

This is more likely to happen to your delivery or team focused objectives, learning skills and personal development will not be impacted as much by sudden corporate upsets.

If you recognise that something's got out of date, then you need to reset at the soonest possible moment. The longer you run with objectives that aren't viable, the less they will contribute to your performance review. Sit down with your manager, discuss the situation and agree what should replace your outdated objectives and start pushing towards those new goals.

Wrapping Up

With a small amount of focus and effort, you can set up the performance review cycle to work for you.

1. Outline your goals
2. Set strong, measurable objectives
3. Agree them with your manager and record that agreement
4. Capture evidence of your success

Do all of this and you'll present yourself in the best possible light. You'll dodge the stumbling blocks of "What have you done for me lately?" and be alert for any changes on the path.

Win the performance review and you'll get where you want to be in your career!