



# ANNUAL REVIEW PREP SHEET

REVIEW DATE:

NAME REVIEWER:

1. HIGHLIGHTS FROM YOUR  
RUNNING TO DO LIST

2. WHICH PROJECTS  
DID YOU LOVE  
DOING?

3. NAME 4 IMPROVEMENT AREAS

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4. WHAT ARE YOUR NEXT STEPS

5. WITH WHAT CAN  
YOUR MANAGER  
HELP YOU

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*eveSelle*

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THINGS TO NOT FORGET!

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6. WRITE DOWN CONSTRUCTIVE CRITICISM TO YOURSELF

7. PRINT AND BRING THIS SHEET!

NOTES DURING MEETING

TO-DO'S FROM THIS  
REVIEW MEETING:

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- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

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## The annual performance review. 7 steps to ace it.

It is the end of the year which means you probably got a calendar invite to your yearly annual performance review. Chances are your manager and yourself are dreading this conversation, so make sure to be prepared. Preparing for this meeting, will also shine a light on your goals and where you want to go in life and career. So don't wait for the invite to show up in your mail box. Start preparing today with our ultimate 7 step checklist and make sure you know what you want to get out of your performance review.

### 1. Keep a running to-do list

This is something you should be doing all year long. Then in preparation of your meeting go through your entire year, and highlight the things you did that you feel need to be discussed during this performance review. Make sure to know when you did what, what the outcome was and how it effected the company.

### 2. What made you proud

What are the things you did this year (career-wise) that made you proud and gave you a sense of fulfillment? Write those down. By knowing what types of projects you love to do, you will be prepared to ask for more.

### 3. Where can you improve

What are the areas in which you think you can improve. Going through your to-do list can also help with this question. Things that were postponed or dragged on for weeks or even months are usually not the ones that inspire you.

### 4. What will be your next step

Write down your long term goals in life and career. See how they overlap (or not). Break them down in smaller short term goals that you can use to discuss in your performance review. For instance if you are looking to be promoted to senior management or to join the board of a company as a long term goal, you could discuss that you would like to be involved in more projects with other senior managers so you can learn from them.

### 5. Make your manager work for you

Yes you work for a company and your manager is usually your boss, but they need to create a work environment that can help you reach your targets. Tell them where they can help you, this could be reaching out to other departments, organizing meetings maybe a bit better or getting you in the door with clients they have already worked with. Chances are big that if you ask, you shall receive. Your manager has most likely been where you are right now, so she will want to make sure you succeed at what you are doing as well.

## **The annual performance review. 7 steps to ace it.**

### **6. Constructive criticism**

No one likes to hear that they are not doing a good job, but there is a difference in not doing a good job, or doing an even better job. During your performance review you will get some constructive criticism to help you be better at the things you do. However try to prepare for this and give yourself some constructive criticism. This way you can understand in what areas you still need to grow or where you can use some guidance. And you can also prepare questions on how you think your manager can help you along the way.

### **7. Bring your prep checklist**

During your review you might be nervous or don't remember all the things you wanted to discuss. Make sure to have done your research and bring your checklist into the room. It will be your go-to document for self-promotion, and reflecting back on the year.

**In the end remember no one likes these performance reviews, but they are there to check back at how the year went, what went great and what can be improved. The best you can do is to be prepared, and make sure to get out of the conversation what you want.**

**[Check the blog article here](#)**