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## What do you say in a mid year performance review

In an interview in August 2018, Donald Trump was asked, “What grade do you give yourself so far?” He replied “I give myself an A+. I don’t think any president has ever done what I’ve done...” Very few of us approach a performance appraisal with the self-confidence of Donald Trump! In fact, an imminent review can leave many feeling anxious about what to say and how to ask for what we want. And that’s fair enough. In my article “How to Speak Up for Yourself at Work”, I talked about your perceived power base. If you feel your power base is lower than your boss or company (which for most of us, it is), you will hesitate to speak up because you fear the consequences. But, the good news is our perceived power base isn’t fixed and there are steps you can take to feel confident and prepared for your next review. Ask about the business In any relationship, asking questions about the other party is a great way to break the ice. It’s also a good way to feel more powerful in the discussion because you’re making a meaningful contribution. By asking pertinent questions about the business, you demonstrate your business nous, openness and willingness to have a mature two-way conversation. For example, ask: How did the business perform in the last year? What goals does the business want to achieve next year? What does your manager want/need to achieve in the next year and how you can help? I’ve included a list of questions to consider in the Performance Review Checklist. Talk about your achievements A good place to start is to take out your job description and list your achievements since your last review against each of your responsibilities. It’s important recognise your self-assessment represents the view of only one person... you! To balance your self-assessment, see if you can source data, reports or feedback from colleagues or customers to add evidence and balance to your appraisal. Once you have gathered this material, summarise it neatly in a short report, which you can give to your manager and HR at your review. Be upfront about your strengths & weaknesses Everyone has strengths and areas they can improve. You should absolutely sell yourself in your review. As Australians, many of us find self-promotion culturally uncomfortable. It’s considered un-Australian to boast. So, it’s about striking the right balance to stay authentic but not downplay your achievements. If you only talk about your strengths and refuse to acknowledge any failings, you risk being perceived as arrogant. But downplaying yourself isn’t to your advantage either. As the actor, Brooke Shields warns, you risk undermining your potential for promotion, pay rises and other wins. “I spent my life trying to be humble. And it has a boomerang effect if you’re not careful, because being humble is also dimming your light. Don’t undermine yourself,” said Ms Shields. This is where being prepared can help you say the right thing in your performance review. I recommend you conduct a self-audit (you’ll find this in my performance review checklist). Write down your strengths and areas for improvement so you know what you’re going to say. Think through how to answer any questions you might find awkward so you’re not on the back foot in the meeting. For example, you might say “I recognise I have sound technical skills but I need to improve my leadership skills. I know the business needs leaders with my background to achieve its growth plans, and I would like to be a part of that team. Is the company willing to support me with leadership training so I can upskill?” If you approach difficult conversations using this kind of language, you create a win – win scenario for both parties and demonstrate self-awareness. The business wins because it builds its leadership capability and retains talented technicians and you win because you create a pathway for promotion and gain credibility for your emotional intelligence. Set clear goals that work for you and the business Setting goals is a great way to clarify expectations between you and your employer. I recommend you use the SMARTA approach to setting goals: Specific – name your goals. So rather than say “I want to earn more money” say “I want to earn \$100,000 per year”. Measurable – if you don’t measure your goals, how will you know if you’ve achieved them? Quantitative goals, like salary, are easier to measure. If your goals are qualitative, like developing your leadership skills, set some criteria for how you and your employer will assess that. Achievable – really think about your circumstances. For example, if you’re going for a promotion, you might need to work longer hours so think about how that fits with your circumstances, particularly if you have a family. Realistic – goals have to be realistic. There’s no point setting the goal to be CEO next year if you’re the intern! Your career is a marathon so think about the next logical step to move forward. Time-bound – setting a deadline is a great way to stay focused and motivated. By placing a time limit to your goal you give yourself something to aim for and report back on at your next review. Aligned – this is the emotional intelligence aspect again. Aligning your goals with the goals of the business will help both parties get ahead, which means you’re more likely get what you want. Ask for what you want One way of getting what you want is to ask for it. As a coach, I hear many people complain they didn’t receive a promotion, pay rise or some other employment benefit but when I ask “well, did you ask” the answer is often no! You may be one of many employees but even if it’s just you and the boss, don’t expect your employer to be a mind reader. It is your responsibility to manage your own career. If you find it difficult to ask for what you want, think about how to ask. Money When the business gives you a pay rise, costs go up. So, to help sell the idea of a pay rise to your manager, think about how to demonstrate that you’ve helped generate wins for your employer. Or, pitch your ideas for the next financial year on how you can help the business generate more income or be more efficient. Profitable businesses are in everyone’s best interest, it means they can pay their bills on time and there is money to invest in growth and development. Another angle to consider with regards to a pay rise is risk. If you ask for a flat salary increase, the business carries all the risk. That is, they will have to pay you the extra money, regardless of how well you perform. However, if you ask for a pay rise in the form of a bonus, both parties share the risk. That can make a pay rise more palatable for your employer. A word of caution about bonuses, be very clear about what your goals are and how they will be measured so that you and your employer know exactly what you have to do to earn your bonus, when and how it will be paid. It’s also worth seeing if you are doing significantly more than what’s on your job description. But, I urge you to use this approach cautiously. Being petty about small additional tasks won’t earn you credibility. If you’re going to ask for more money based on broader responsibilities, make sure your claim is substantial. Finally, source some salary benchmark data for your industry and measure your role against the average. Are you being paid within the salary band or are you below the benchmark? This information can be found on many websites including SEEK and LinkedIn. If you can’t find this information, speak to a recruiter in your industry as they will know what people with your skills and experience are being paid. Flexibility While every employee appreciates money, not everyone wants to do more work to earn more pay. Rather, some people opt for flexibility so they can carve out time in their week for family, volunteering or other interests. Employers recognise that offering flexible work is a good way to retain and motivate talented staff. However, just like the money discussion, flexible work arrangements have to deliver good results for the employee and the employer. Use my performance review template prepare your case on how the business can offer you flexible work without jeopardizing productivity. For example, some people offer to work 40 hours over four days instead of five, so they can have a long weekend. Training Being a life-long learner is a great way to stay motivated and keep your skills up-to-date for a long and prosperous career. Training is also a relatively easy ask at your performance review. Once you have discussed your strengths and limitations and your goals with your manager, it will help you identify where there are gaps in your skills. If your employer is serious about getting the most out of you, they should be willing to invest in your training. But again, you are responsible for managing your own career. So don’t go into your performance review with a blank page. Research the courses you would like to do, find out how much they cost, what the learning outcomes are and have a succinct summary ready to show your employer at your review. You make it so much easier for them to say ‘yes’ when they can see your commitment to ongoing learning. Promotion Your review is a perfect time to ask for a promotion. But again, you’ll need to prepare your business case in advance. Before your official performance review, it’s a good idea to invite your manager for coffee to sound out the idea. Ask your manager what the business wants to achieve in the next 12-24 months, ask if they think you’re doing a good job and sound out what your opportunities might be for a promotion. Doing this pre-review step gives you valuable information, so you are confident going into your official review. Next, do your self-assessment. Before you step up, it’s a good idea to demonstrate your mastery of your existing role. Have the facts and figures ready to show your employer how well you’ve done your current job, and that you’re ready to take on more challenges. Plus, factor in any feedback your manager gave you at your pre-review coffee. Then, be ready to ask for the role you want, and to justify why you’re the best person for the job. This means having a genuine conversation about your strengths and what skills you’ll need to develop to step up to the next level. If you really want to blow your employer’s hair back, think about drafting a short plan outlining what you would do in the first 100 days of your new role to generate quick wins for the business. Your performance review is a great opportunity to discuss your accomplishments and share information with your employer. But, it can be hard to know what to say and how to say it to in a way that makes you feel confident and builds credibility with your employer. I encourage you to take the next step and download a checklist of things to prepare for your review. Future U Coaching – Performance Review Checklist Once you’re done that, book a career conversation with me, bring along your checklist and we’ll discuss how to confidently manage your next performance review. Alternatively, I offer a fantastic range of online career learning tools via my website for self-guided learning including: Further reading: Trump Gives Himself an A+ Rating as President Flexible Work Arrangements





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