

How To Prepare For Your Own Review[©]

A Career Management Tool From Manager Tools

<http://www.manager-tools.com>

Write My Own Review?

Hopefully, you spend quite a bit of time preparing your directs' reviews. As you should.

But what about your own review? Do you consider it your boss's job?

Just imagine if one of YOUR directs handed you their review, from their perspective, well in advance of when you needed to do it. Imagine that they had researched their year, going back over projects from even Q1. They talked about strengths and weaknesses, and accomplishments. And, they had a rough idea of what their goals might should be for next year.

Wouldn't that be **great**? Wouldn't it help you do a better job on their review?

So why aren't you doing this for your manager?

This Manager Tools podcast collateral tells you how.

Some Important Basics

- This Process Takes 12 Painless Weeks
 - You Can Do It In Less, But Only With Pain To Your Schedule
- Schedule 30 Minutes A Week – That's All
- Hundreds of Managers Have Done This
 - And They All Loved It
- Finish Before Your Boss Is Told To Start Your Review
- Create A Folder For Notes You're Going To Take
- **Key Point: 30 Minutes, Once a Week, For 12 Weeks**

Week 1: Last Year's Review

- Accomplishments
 - What Did You Do Well? What Have You Forgotten?
 - Some Things May Be Routine But Still Have Traction
- Feedback
 - Were there themes To Her Comments?
 - What Did She Suggest You Work On?
 - Luckily, You Have At Least 3 Months To Improve
- Objectives (For This Year)
 - Remind Yourself Of What You Committed To
 - Develop Plans For Those Commitments You Haven't Yet Achieved
- Boss's Issues
 - With Some Distance, Perhaps There Are Themes Or Patterns To Be Aware Of
- A Change In Forms Or Process Doesn't Change The Value of All This

Week 2: Job Description

- 3 Good Reasons
 - It Pays To Be Thorough – This is Your Baseline
 - Your Boss May Get It With His Packet On Your Review
 - If It's Wrong, Now's The Time to Think About How To Change It
- Capture Key Deliverables And Metrics
 - These May Be (Probably Are) Different Than Your Objectives
 - You May Be Measured On These!
- Prepare Your Own
 - If You Don't Have One, This is a Great Way To Develop a Base
 - If You Have One, It's Good To Get Back to Basics
 - The Reason The Company Created This Job Is: _____ .
 - The Most Important Ways To Spend Time In This Job Are : _____ .
 - The 2-3 Most Important Duties Of This Job Are : _____ .
 - What This Job Takes To Be Successful Is : _____ .
 - The Easiest Way To Tell If It's Being Done Well Is : _____ .

Week 3: Your Resume

- (This Is An Easy Week If You've Followed Manager Tools' Resume Plan)
 - If You Don't Know What That Is, Listen To "Your Resume Stinks", October 2005
- Capture Key Accomplishments That You've Added To Your Resume
- If You Haven't Been Doing That, Might As Well Wait
 - The Weeks Ahead Will Unearth What You're Looking For

Week 4: Boss One On Ones (O3s)

- Another Easy Week If Your Boss Doesn't Do O3s With You
 - But You Can Start Early On Week 5 – You'll Need It
- Capture Accomplishments From YOUR Boss O3 Notes
 - Projects You've Forgotten?
 - Initiatives That Were Short Lived?
 - Small Wins?
 - Filling In For The Boss?
 - Do You Wish You'd Kept Better Notes?
- Capture Issues And Themes of Your Boss
 - Note Them For Consideration As You Write Your Review
 - Even If You Can't Comply, You Can Think About How To Address/Defuse Them

Week 5: Team One On Ones (O3s)

- Capture Your Directs' Successes
 - You Won't "Take Credit For" Their Work – But You CAN Talk About "We".
 - Note Any Training/Coaching/Investing You Did For Them – It Made a Difference
- Capture Failures
 - Be Ready To Talk About Them – Don't Get Blindsided
 - Or, Overcome Them In The Remainder Of The Year
- Capture Projects
 - Particularly Important For Projects Long Since Done
 - This IS An Annual Review – Some Bosses Go BACK
 - Note Where Projects Have Been Left Dangling
 - Clean Them Up Or Be Ready To Address

Week 6: Reports

- Lots Of Managers Keep Reporting Files On Each Direct
 - If You Don't Review What You And Your Team Submitted, You're Not Prepared
- It Could Be:
 - Operational
 - Budgetary
 - Financial
 - Personnel
 - Projects
 - Routine – And Therefore You Don't See And Don't Have On Your Radar
- Budgets ALONE Can Kill An Otherwise Great Review (Perhaps Rightly So)
- Can You Get a Look At Your Peers' Reports As Well?
 - Your Boss's Admin Has Them
 - Next Year, Keep Them After Each Weekly Staff Meeting
- HALFWAY: Don't Quit Now

Week 7: Documents Created

- We Forget All KINDS Of Things 10 Months Later
- Search Your Office and Home PCs
- Sometimes When Searching Email (Weeks 8 And 9), We Miss Attachments
In Windows, It's Possible To Search On "Date Created"
 - There Are Going To Be A LOT
 - But It's Easy To See Which Have 'Review Value'
 - Hidden Trick: Sort Your Search By Document Size And Creation Date
 - Bigger Docs More Likely To Be Important
 - Earlier Docs More Likely To Be Forgotten
- Print Those Out That You Think You Might Need

Weeks 8 And 9: Email!

- While It May Get Boring, It Is Likely the Ultimate Preparatory Step
 - So Many Orgs Rely SO Much On Email
 - It's The Unofficial Record And History Of You, Your Team, And The Company
- Sort Your Mails By Person
 - Sorting By Date Means You'll Be Dealing With Multiple Threads Simultaneously
- Go One Person At A Time
 - Start With Team
 - Then Boss
 - Then Peers And Customers and Projects
- This is Much Easier If You've Managed Your Mail Effectively All Year...
- Either Copy Mails That Remind You of Something To A 'Review' Folder
 - Or Simply Write Down The Item/Issue You Consider Of 'Review Value'

Weeks 11 And 12: Write And Prepare Your Review Packet

- Now That You Have All That Raw Material, Prepare The Review
- Fill Out All Forms As If You Were Your Own 'Direct'
 - Include Numerical Rankings And Short Supporting Statements
 - Don't Forget Next Year's Goals
- To Learn How To Write Your Review:
 - Listen To Our Four Podcast Series From 2005-2006
- Do NOT Include A "Core Message" – Bosses Feel They Own That
 - Unless You Hit a Home Run With Your Most Important Metric
- Add Any Documentation You Think Is Valuable
- And Now, Use All Of This Work To Update Your Resume
 - (Not That You'll Need It)

Manager Tools

The podcast that this detailed collateral document supports is available FREE to all registered members of Manager Tools (and yes, registration is free too).

Manager Tools is a website dedicated to making you better as a manager. We deliver free podcasts every week on topics like how to coach, how to run meetings, how to write reviews, how to manage your boss, and how to communicate. It's all about the basic blocking and tackling of management that no MBA or corporate program ever seems to teach.

We have thousands of members who not only listen to our podcasts but also ask questions and contribute to our discussion forums. Our forums are monitored every day by our founders – and we answer your management questions.

We're ranked #1 in Business on Podcast Alley, and in the top 10 of Business on iTunes.

We tell our members that it's a privilege to serve them – we hope you'll join us.