Preparing For Your Own Review©
A Manager Tools Transcript

Michael Auzenne: Hey, Mark, we got a lot of traction from our podcast last year on how to prepare for annual reviews. People really dug those. I think particularly folks appreciated the detail, the step-by-step that we typically go through, I think that's often what is missing when you look at all the management advice that's out there. Another interesting thing is that it was the first podcast that we did that was tied to a specific time or a specific event, you know, given that companies mistakenly do annual reviews around the calendar year.

Mark Horstman: Thank you for saying "mistakenly." I think we actually have to do a cast about the system of how to do annual reviews in a company. Not really addressing the HR perspective, but we tend to stay away from keeping your company better through systems and policies. But the annual review one is a great one to teach how to do reviews on a year round basis.

Michael Auzenne: Yeah, we talked about preparing annual reviews that they are giving to THEIR directs, but what we didn't talk about - which is to some people even more important - is how they get ready for their OWN reviews. And, luckily, for them, they only need three months to get ready. So why are we doing this cast in July?

Mark Horstman: You know, it's funny when you're talking about how people enjoyed the detail, because of course we did FOUR casts on reviews and we were worried about that. "Gosh, would this really grab people's attention for four shows?" And of course it did. But I always worry about that, because when I laid this out for coaching clients, I remember they would say, "Gosh, this seems like so much stuff." But there are a bunch of reasons, and when you hear them, I think there are people out there that would say, "all right, I hadn't thought of that." So, let's go through them -- six or seven of them, even.

Mark Horstman: First of all, the reason you start now in July or early August is a reminder. If listeners haven't been doing their team's quarterly reviews - because remember one of the things that we talked about in annual reviews is that you would start doing reviews of your folks each quarter to reduce the chances of surprise at the end of the year. If you haven't been doing that, think about this. If **you're** not doing that, what are the chances that **your boss** is doing that? And if your boss is not, ask yourself, "How much have I been thinking about writing the reviews of my directs in the middle of the year?" And that's probably even less than your boss is thinking about what he's going to do about writing **your** review in the middle of the year. What that means is you need to be scheduling those end of Q3 reviews with your folks now. Get them on the calendar, so that at the end of the year, you'll at least have one under your belt, and you won't be reinventing the wheel the way everybody seems to do annual reviews every year.

Mark Horstman: Second: look, we know how busy everybody is. They'll hear the cast, they'll think about it a little bit, 'wow this is great', hopefully, and they'll put it off. Or maybe they'll schedule something for August. And things are going to get busy for whatever reason, it'll go on the back burner for a couple of weeks and suddenly they're starting in September. No offense, but that's probably what you and I would do. You look at developing or spending some time on yourself and you put that on the back burner so often. We're not trying to be rude here and suggest that they're not following the exact manager tool's way. So if they start in September, three months is December.

And something else to think about, you'll want to be done preparing for your own review before you have to start working on your team's review. So hopefully, you'll want to be done early in December. Now look, if they get right on it right now, they'll probably finish early. And that's fine -

you can just put the file aside that you developed, give it a one hour overview and some polishing, starting in December, and then you can go shopping for Christmas and be that much more ready in terms of delivering your own team's reviews.

Michael Auzenne: Can you imagine going to Christmas vacation having done all of this, and being ready for the end of the year reviews?

Mark Horstman: Oh, yeah, imagine. Imagine going on Christmas vacation having it done, and telling people, "Oh, no, I'm already done." [laughter]. That's a little of the "Dark Mark" coming out there.

Michael Auzenne: Poke them with a stick as you're walking out the door with a smile on your face. "Yeah, I'm not worried about that."

Mark Horstman: OK, another thing, third: every quarter you're supposed to be spending keeping your resume current. That's what we suggest in our resume cast. Only probably a lot of them haven't been doing that either. This gives you some encouragement to schedule that now. And it's not hard to schedule because it's only time at your desk alone reviewing stuff. It gives you time to schedule that now to catch up on the first half of the year. At this stage, it does not have to be exhaustive because the process may unearth a great deal to help you think more clearly about your end of year review. But you've got to start. And we have a little hint: those of you who stay with this until the very end of this cast will get a little bonus idea about resumes and reviews that's worth staying for.

Mark Horstman: OK, fourth, as you do this, you may be disappointed at how you're doing this year, and starting in the middle of the year gives you a fighting chance to do something about it. I can't tell you how many people get worried fast, when I tell them in November, 'hey you know you really need to do this, I thought everybody did this'. And it's kind of disheartening, it's almost like a punch to the gut before you start.

Michael Auzenne: Right. You're right, though, I think it's like a marathon. If you're in effect a marathon runner, a competitor, you don't start thinking about your time with only a half-mile left to go.

Mark Horstman: Perfect! And, you know what, if you do spread it out, if you give yourself a half-hour a week, it becomes painless, it becomes part of the routine, the boring, the unsexy, the unpretty part of management, and at the end of the year, when everyone else is pulling out their hair at a time when they're going through Christmas, as so many of us, you don't have to worry about that. In fact, I don't want to talk about this so much, one of the great things about that would be if everybody else is so busy, you're going to have some free time, ask yourself what you really want to be doing and want to be known for next year. Spend more time thinking about what you're going to do next year in terms of self-development.

Michael Auzenne: Yes. And having done this one year, doing this the subsequent year is a lot, a lot easier.

Mark Horstman: Oh, yes. I would even argue that if it takes you three months to do it this year, it will take you six weeks the next year.

Michael Auzenne: Yes.

Mark Horstman: Fifth, if for some reason, the cache on your server won't hold a year's worth of you and your boss's and your team's email, because the IT people want to keep their servers neat and clean and pretty, and they limit a PST file to a gigabyte or whatever, now is the time to beg for more to burn your PST or all your email to a disk in some fashion so you have them to look at at some point later. I've been burned by that before. "Oh, no, we only cache three months worth of emails."

Mark Horstman: And then, lastly, because this is our first member's cast of year two of manager's tools, and we're actually kicking off a series, with a bias toward career and self-management. Topics like preparing yourself for a layoff, how to get ready if your company is being acquired, considering an MBA, how to start a new job, those kinds of things. They're absolutely managerial in nature, but many of them apply to anyone, whether you're a manager or not. So, this is just a way for us to start with a really interesting cast a lot of people like, and it's really more of a self-development cast, which is an important part of being a professional manager, no question about it.

Mark Horstman: And, then I would just say, one more comment about time. Could you, if you had to do this all in one day, do it? You almost could. The problem with that thinking is that as go through this, you discover you need stuff to help you put your review together, whether it's looking at emails, or looking at documents, or whatever. And it happens every year, if you wait too long, and you panic a little, what ends up happening is you rush writing your own review, which just seems to me galactically stupid. [laughter] Is that a word - galactically?

Michael Auzenne: I don't know.

Mark Horstman: I think spell check flagged it.

Michael Auzenne: I think it's fairly accurate.

Mark Horstman: Yeah. It's not quite universally stupid, but it is galactically stupid. [laughter]

Michael Auzenne: OK, well, those are great reasons. When I asked the question, I thought I would get one or two, now we have seven. You're full of spirit, that's what we get for staying up until 4:30 in the morning writing show notes. [laughter]. And that's true, folks. I got lucky after we got done our work in the evening, I think I got to go to bed at 3:30.

Mark Horstman: Yes, that's the lovely part about us having our own jobs. [laughter].

Michael Auzenne: I love podcasting.

Mark Horstman: OK, so those are all great reasons. So, let's get with it, Let's remember the process takes three months because if we only have you spending 30 minutes a week on it, if you spread that only over 220 work days in the course of a year, that's less than 3% of you evaluating your performance. And something else, too, Mike, we're suggesting that you schedule this time while you're at work. There are two reasons for that.

Mark Horstman: I've really come to lean that managers who take homework home always tend to give that part of their homework, whatever goes home in their briefcase or their satchel, or their backpack, tends to get a very low priority to work on while they're at home. You know, career management within your firm just seems to get pretty low status. No deadline driving it, no boss yelling for it, and frankly, I'm fine with that because if you're marginally efficient, everybody listening has 30 minutes at their desk every week to give to this project. There is nobody who's listening, who can’t find a half an hour in your calendar once a week to do this.

And, really to be fair, the idea of doing this on your own time at home at night is just one more thing to take away time from what's more important than work, and that's your family. Your spouses will thank us if you spend a half an hour with your feet up at your desk at 5:30 or 6:00

and do this. It will probably will run a little longer than a half an hour, though, because we all know how terribly inefficient managers are from 5:00 on, but that's still OK. Just get home when you need to get home.

Mark Horstman: OK, with those comments in mind, we have a week-by-week planning calendar we're going to walk though. We're not saying any of the weeks are sacred, but you'll find that it generally is best to go through this order. It's not really a hard and fast rule. It's important probably to get weeks one and two done before you do anything else. But if you finish week four early, and you want to head right in step five, go for it, that's no problem. If you get behind, and it's been nine weeks, and you're only on week five, that's OK, too, we're just trying to give you a numerical system in terms of a rank ordering, what order to do them in. As long as you figure out how to make up the time when you're four weeks behind. I will say that some managers have told me that they started right in on going to email when they learned the way to prepare everyone else's review, and that including mining the email, which is a really powerful part of the process. They would immediately say, “Let me start going through emails real quick”. I think that's step 10, or something like that. And that's not a good plan, moving that all the way up to week one or week two. If you swap any couple of weeks adjacent tasks, that's fine, but moving week 10 up to week one is not that smart. You're going to be much more efficient and effective in looking at email the way we suggest if you've done the other work beforehand. And then before we go into the week-by-week review, one final kind of thought. Several of the steps that we're talking about here sound alike, they'll be much more effective in a large company. We're not in any way trying to slight the small company members we have out there at all. Maybe in your small company, for instance, you don't have job descriptions yet.

Michael Auzenne: Many of them don't even have reviews.

Mark Horstman: Yes. Surely, you won't argue with us, though, that this is a good cast topic, and if you think about it, it wouldn't hurt for you to prepare an end of year overview for your boss even if you don't get a review. It may effect salary administration, even if there's no formal review process.

Michael Auzenne: There's a review, it may just not be written.

Mark Horstman: Exactly. In fact, that ought to be one of the distinctions between big and small company. If somebody says they're in a small company, we ask them, "OK, is your review written or unwritten?" If they say written, I'll say, "Maybe you're a medium-size company. You're not a small company anymore."

Mark Horstman: Look, we have a work around for job descriptions. Here are the questions to ask yourself to create your own job description to make sure you're on the right track. And, virtually, every week we have in here has validity for a small company or a startup. So, I wanted to say that, because I was reading my own notes from years ago, I thought, you know, there's a big company feel to this. And yet if a small company people approached this as I think this is a great self-management tool, even if we don't have reviews, I encourage them to stick with this. Because if you get this done now, if you get it down now at a small company, when you are a bigger company, or when you join a bigger company, you're going to have it down. And you won't need to be worried about “making the transition” to a bigger company. You'll know how professionals go about preparing for their annual review.

Michael Auzenne: Yes. One side comment that's a little bit off topic here: people at small companies shouldn't short-change the value of job descriptions. As a matter of fact, you know part of why we're up until 3:00 in the morning last night is because we were talking that we don't have job descriptions, and we discovered that there was a particular task, or responsibility, that we both thought that the other person was responsible for. And it turned out that it was smack dab in the middle between your skill set and my skill set, and we both have responsibilities around that, but we both pretty much deferred that particular task to the other.

Mark Horstman: In fact, I would argue, Mike, one of the things that makes small companies great, and certainly in our case the whole trust thing -- I trust you to do that and you trust me to do that -- in fact, becomes a potential weakness in that trust makes me feel comfortable, not even thinking about this thing. And, at the same time, you're thinking, I don't even need to think about that, he's got it. And that ball is absolutely on the floor. Because of what we consider a strength about our organization, which is trust.

Michael Auzenne: Right, well there you go. So, even we could use some better job descriptions. Maybe we'll put that on our list of things to do here. All right, let's get going. Well, step-by-step, what are the tasks involved here over this three-month period.

Mark Horstman: OK, well, let me just do the real quick high-level overview that everyone seems to love, and, quite frankly, helps me as well. Week one, you're going to review last year's review. Week two, you're going to look at your job description. Week three, you're going to look at your resume. Week four, you're going to look at your notes from your boss's one-on-one with you. Week five, you're going to look at all your one-on-ones with your team. Hopefully, this is not a reminder that you should be doing one-on-ones - those should already be happening. Those are the core principle of Manager Tools for managers. Week six, you'll going to look at all of the reports that you and your team prepare and send forth about your organization. Week seven, you're going to do something really creative that I suggested a couple of years ago, you're going to look at documents that you created in the past year. And in weeks eight, nine, and ten, the lovely weeks when you're going to look at emails, which takes a little while. And then weeks 11 and 12, you're going to write and prepare the review. And, actually, it's going to be a review packet. OK. So, that's it -- high level. Let's talk about each one in detail.

Michael Auzenne: Cool.

Mark Horstman: Last year's review. Now, look, this is probably the silliest thing in the world, that far too many managers that I know that I've coached, go into their annual review without even looking at last year's review. Look, this is bad. If you have the same manager, why wouldn't you want to refresh your memory, what she said, and the tone she took, and what themes there were that you didn't expect. Or, if you have a different manager, what do you want them to know that maybe you need to review from the previous year to carry forward. What might they be thinking about, because they've looked at it, that you've completely forgotten, and they feel like they need to provide continuity between last year and this year. And that's what I would do if I were your new boss, I would look at last year's review.

You don't want to be blindsided because you didn't spend a little bit of time, a half an hour, looking at your view. OK, look, in week one, you are going to go over your last year's review. And the purpose of this half hour is to take notes for the rest of the process. In fact, Mike, I would argue, that really what we're doing in the first 10 weeks of this is preparing the raw material so that you'll be totally comfortable writing your review.

Michael Auzenne: Yeah, there you go again with creating those piles of stuff again.

Mark Horstman: [laughter]. But it's valuable, a valuable pile.

Michael Auzenne: Horstman's law number nine: great big piles!

Mark Horstman: Big piles. [laughter]. Oh, it's here in this pile on my desk somewhere. God, if you're saying that, I guess sometime we need to do a podcast on desk management. OK, so look, you're going to create a folder for this. Those of you who are getting things done disciples, you have a label maker, and it's going to be nice and pretty, and we're going to make it even easier for you. On the web site, we have a simple form for capturing your thoughts on each of the major tasks and forms of data you'll be looking at. When you combine that, Mike, with the slides, they're going to be on the web site in PDF form for this cast in terms of describing in detail what we're talking about here, and the transcripts, you put those together in the packet, and you put the note-taking form in there. I have to tell you, it's a pretty awesome package. It will make this as painless as we can possibly make it. We are not available to prepare your review for you. [laughter]. But, to me, this is a reminder of the value of what a premium subscription will be, because that's the kind of stuff that'll be out there for premium subscribers for both monthly casts, and obviously weekly casts.

Michael Auzenne: It's going to make it a lot easier.

Mark Horstman: Yeah, it won't be turnkey, but boy, it sure will make it simple, as simple as we possibly can. So, in Week 1, when we're looking at last year's review, there are four things we want to be looking for as we go through the review. The first one is obviously the **accomplishments**. What did you do well last year? Some of these projects that you were working on from last year - some of the numbers - may have carried over to this year. What we found is that last year, if you did really well on something and it made your review, this year it's assumed you can keep up that low level of cost or that high level of sales, or whatever. So, it becomes a routine, and you don't get credit for it twice. So, we kind of forget about it, it just becomes kind of "the way we do things here". But, look, if you drove down costs last year, and this year you kept them low, even though you didn't have a goal for that this year. You've probably forgotten about it, and you need to remind yourself and put that down as potential fodder for how you write your review. OK. The review helps you think about themes that maybe secondary this year, but still have traction, and they were important somehow last year. Again, what did you do last year that carried over -- maybe a project was split between the two years? This review around your accomplishments will refresh your memory. And, again, you're just taking notes. It's going to inform everything you do for the rest of this 12-week process.

Mark Horstman: Second thing you'll look for is feedback. If you have the same boss, you better refresh your memory about what she talked about last year, that'd be smart. But, remember the Horstman Christmas Rule, which is, you ask people, "Is Christmas important to you?" "Oh, gosh, I love Christmas, I love seeing my kids open presents." And I ask them, "OK, well, it's great, but is it stressful?" "Oh, YES, I'm wiped out afterwards, and every year, I want to cut back and make it simpler, but I never do. We always wind up doing too much, and I'm always tired of work, and then I've got reviews to do."

Well, it's just the Christmas rule. *Anything that you do just once a year that's really important to you, is going to be terribly stressful because you don't get to practice it*. That's exactly true with reviews. They only do it once a year, they don't practice, they don't think about it systematically, they don't make it routine and boring and predictable and unsexy and unpretty. And then they get stressed out about it. You need to go back and review your review from last year and look for negative feedback. Even on some of your accomplishments. So, if there's a potential for something to come back up this year, if you didn't address it specifically this year, you'll know how to combat it if in fact he or she writes about it.

Michael Auzenne: You're doing this fairly early in the process, so like we talked about earlier, if you found there's feedback you haven't addressed, and haven't done anything about, you have an opportunity to do something about it now versus like early January or late January, when you usually start thinking about it.

Mark Horstman: Yes, in fact, if you do this now, I guarantee you within two or three weeks, your boss may come to you and say, "Man, you seem to be re-energized". And, privately, you're thinking "Yeah, I don't want to read about this thing that I was really important in my development plan next year that I haven't done anything on, yet." Of course, if you've worked with your admin real well, your admin, right after your review, you should be scheduling a hour with your admin, and say, "look each quarter or each month, you should be asking me where I've gotten on these seven, eight, nine, ten things that came out of my review…so that I don't have to wait until September to cram everything in."

Michael Auzenne: Good point.

Mark Horstman: You'll also want to look for comments in any of the numerical rankings on your review. People miss this. People tend to focus on salary and one or two key areas, the major write-up, looking for the key buzzwords that the company considers to be important. You know, when you and I were in the Army, it was the big thing with the senior rater's review, and what you're looking for is "truly outstanding" as opposed to just "outstanding". That actual phrasing made you a top performer. [Interestingly, the military has the best way of handling reviews I've ever seen.] So, our focus is so much on one or two key areas, we forget to look for comments in numerical areas, you know, additional comments below, supplementing the ranking of one through five, or whatever scale is used. And you want to look at those, and you want to think about those versus this year's because you can bet your boss is going to look at this. How did Mark do on these things that I mentioned to him last year, or a previous boss mentioned to him last year?" Look for any suggestions in improvements in the characteristics, not just where you were "ding-ed" maybe, but, "hey I'd like you to do more of this next year." And then you subtly start introducing that evidence of that change in August, September, and October. You're going to look good at the end of the year.

Mark Horstman: Again, make it easy, give yourself a weekly reminder. You need to be working on presentation skills. You need to get your agendas out. If you do a control+shift+k weekly agenda reminder, it's much more likely it's going to be a relatively painless improvement process for you over the remainder of the year. And it'll be easier for your boss, saying "Wow, I've really noticed a difference in terms of you getting on that. Thank you for doing that." And a lot of times the question of whether you get a top ranking or a good ranking, hey he could be in the top, I don't know exactly where he should be, I need to look at everybody else on my team. But then they start looking down at the details, and in every one of the detail areas, you're hitting home runs, or they're noticing a significant change. That can be the thing that makes a difference. Maybe not hitting a home run in the top area, you can still end up getting a top review.

Michael Auzenne: What about **objectives**?

Mark Horstman: Okay - good. Maybe your firm or company separates this process of creating performance objectives, goals, or development objectives from last year's review, but many don't. And our point is we don't think of it that way. If you do separate them, consider the two documents as one for the purposes of the process that we're talking about. You need to write down in the note taking form everything you committed to doing in December of last year or January of this year.

Michael Auzenne: Good to know.

Mark Horstman: Yeah, if you're worried about where you are, it's better to know it now and remind yourself "oops," the Thanksgiving "oops, uh-oh, I'm in trouble, I better pretend like I've done something in that area." So you want to be able to do that and check them off. Or make notes on the ones that you've already got done.

Mark Horstman: And lastly, **number four, boss's issues**. Now, as you have some distance to the review, which you didn't at the time you were getting it, you were probably just nervously looking for the percentage of salary improvement you were going to get in many cases. Now, after knowing your boss a little bit better, you may see a pattern or a theme or a tone in your boss's review from last year. Make a note of it. Think about how it'll affect the objectives he or she gave you for this year, whether you're going to achieve them or not. If you're not achieving an objective in an area that seemed to be thematic important to him last year, ask yourself what you can do to get ahead, or at least get close to achieving in the last six months of the year. There's no need to solve the problem, if it is a problem, now. But it'll be easier to think about *doing* something in 10 weeks if you start *thinking* about it right away.

Michael Auzenne: I think the key here is to put yourself in your boss's shoes for a little while, because your view of what is important, and his or her view of what's important, may be different. And last year's review will give you good hints as to where he or she places their priorities to when it comes down to doing the review. And, in my experience, sometimes the review is not reflective of what they're telling you during the year.

Mark Horstman: GREAT point. Now, look, what we've just talked about sort of implies that there's a benefit to thinking about what your boss did last year. But even if your boss is different, it's still worthwhile to go through these steps, and if you have a different boss, and you don't have their comments, that's fine. Go talk to former directs of your boss, if he or she was in your company at the time. See what they say about their reviews; look for any themes that were there. If you were asking me if I worked for you and then you left and worked somewhere else, "hey what is Mike like when he does reviews", I'd be happy to give you my review, I'd probably tear off the page about salary review. I know a lot of people wouldn't do that, but I don't care, it's just a way to make things easier.

Mark Horstman: One more thing, Mike, it probably seems silly to say this out loud, and I probably said this several times during the cast, just because your firm or your organization or your company changes the process or the forms that they use to do the reviews, this accomplishment-feedback-objective-boss's issues thinking is still quite important. Just because the review process or the form changed doesn't change **this** process you're going through. You'll be the most ready person to take the new form and write your review on it really, really quickly. In fact, I would argue that if you do it well, your boss is going to say, "Oh, this'll give me some sense of what I'm thinking about when I'm writing everyone else's review."

Michael Auzenne: Yeah, the forms have nothing to do with the process.

Mark Horstman: Exactly.

Michael Auzenne: OK, so we're on to week two, which is the job description.

Mark Horstman: So in week two, Mike, you're going to make notes based on your **job description**, and again, we have a place for that on the form. There are three good reasons to do this. First, obviously, it just pays to be thorough. It's technically the baseline for what your job is, and if you don't know what the baseline is, and your boss covers it in the review, you're going to feel stupid, and rightfully so. OK. Second, and this is sneaky, the company often provides your job description in a packet with the review they give to your boss. And maybe you know that, but some managers forget this, and if you're not a manager, you don't know that, and it's good to know. It's good to review something that your boss will be reviewing before she writes your review.

Michael Auzenne: Yeah, it's good to know what they're thinking about when they are writing.

Mark Horstman: Part of the point of this, right? And then finally, if it's wrong, you're going to want to change it, or make some suggestions about how it can be improved. OK, so what do you do with it? Really, there are just a couple of things to do with your job description, and that is, number one, you want to look at key deliverables and metrics. You want to look for what the job description says you're supposed to be doing, and make notes on all of that. Sometimes, it's close, it's not exactly right, and you're going to need to know how what you're doing now or what you've been doing throughout the year connects to this, when you write or get your review. If it's not close, you may want to make notes for starting to change it, even though changing your job description is probably, it's a whole other cast. I wouldn't say to my boss, if I got a bad review, part of the reason for this is a really bad job description. You should be making the case for how to subtly change it without formally changing the form, in the end of your review, by saying hey, the job description says "X," but I hope you see where I've been working on "X prime," which is really what the job description would imply, based on the changes and responsibilities and roles around here in the last couple of years.

Michael Auzenne: If you're, in fact, doing this, as we suggest, in week two of this three month process, you have plenty of time to go back and get your job description changed. These things are not immutable.

Mark Horstman: A lot of people think, oh, they are immutable, and some person who is responsible for job descriptions has to approve everything. HR is probably going to say, 'wow, really, you have time to do job descriptions! Do you want to serve on a HR committee?' … "No. Thank you, no." OK, the second thing you want to do, as a thought exercise, and this is what you make notes on, you're going to create your job description, using that creating a job description idea we gave you in the review cast last year.

Mark Horstman: There were actually five questions we asked you to ask. We'll repeat them here, and they're on the form, by the way. The reason the company created this job, is number one. Number two, the most important ways a person doing this job should spend their time are? Number three, the two to three most important duties of this job are? Number four, what this job takes to be successful is…? Number five, the simplest way to see if this job is being done well is…? And that just gives you a different way of thinking about your job a little bit more analytically, one step removed, rather than thinking about yourself and what you've done. Thinking about the job, itself, without you in it, helps get you thinking about your role. You may find that you're a little bit off in terms of where you've been directing your time, and you may need to reengage in some things that maybe have fallen by the wayside, if your boss is going to use your job description, which it's possible he or she is.

Michael Auzenne: Well, if you ask these questions, it's going to reengage your brain, whereas if you're reading that kind of crusty old job description on your formal job description, your brain's probably going into autopilot at that point.

Mark Horstman: In fact, you start reading, and autopilot's a good way to describe it, you just kind of say, 'yeah, OK, I've seen this before. It's been a while but I've seen this before'.

Michael Auzenne: It's like driving to work and getting done with your hour commute and having no earthly idea how you got there. And thinking about your job description before you get reviewed on it is not a good place to be on autopilot.

Mark Horstman: Yes.

Michael Auzenne: OK, week three. The resume.

Mark Horstman: It's an easy week, this is an easy week, Mike, if you've been doing your resume work throughout the year, and we just *know* that everybody has.

Michael Auzenne: All listeners, I'm sure they are. I'm sure.

Mark Horstman: Absolutely.

Michael Auzenne: I'd be very surprised if they weren't.

Mark Horstman: I'm amazed at so many resumes. I got two this week, from people I know, saying hey, would you please look at these, I need to update them, and the last job always looks like cr**. Sorry. So look, all you have to do here, though, is capture key accomplishments that you put down on your resume. You put it on paper other than your resume, so you can get it off your resume. Basically, you put it on your note taking form. It's not an exhaustive list; it is just most managers think differently about what they talk to other companies about versus what they'd pitch for a good review. People tend to winnow out, or weed out things that might go on their resume, so the resume is just kind of a place to start, but that's fine. We're just gathering data right now. Now look, if you haven't been doing that, we recommend that you wait to do this until after you've gone through this process and mined all the data that you're going to be able to look at in order to bring your resume current.

Michael Auzenne: Would you recommend them leaving this resume on their desk for the next few weeks, would that be a good idea?

Mark Horstman: Absolutely. Feel totally comfortable, corporate America, worldwide, it's OK, leave your resume right on your desk. It won't bother your boss when she walks by...

Michael Auzenne: Make sure you turn it so that people walking in the door don't have to read it upside down.

Mark Horstman: Make sure it's very obvious it's a resume, that it's one page. Yeah. Good, good plan. Gosh. You know what? In a few years, leaving your resume on your desk will be OK, and we talked about that, actually, that it's still not appropriate, but the way we see resumes, is it's just a way to capture your performance. Maybe what we should tell people is hey, feel free to leave your resume on your desk at any time, and when your boss says, what the heck is your resume doing on your desk, you can say, "Oh, I'm just preparing for my end of year review."

Michael Auzenne: There you go.

Mark Horstman: That's the Manager Tools answer. OK. So that's week three, doing your resume. If you've already been doing it, it's easy to capture that stuff that you've been adding over the course of the year for your present job. If in fact you haven't been doing it, then you get a pass for this and you have to redo that at the end of the year.

Michael Auzenne: OK. Week four, boss one-on-ones, which I'm sure, everybody's fortunate enough to have a boss that's doing one-on-ones with them.

Mark Horstman: We actually had a spate there, for a while, on the discussion forums, Mike, where people were saying Mark, please tell me how to get my entire organization to do this, and hopefully one of the themes that came through over and over again was you really can't make your company do this stuff just because all of a sudden you've discovered the right way to manage. No offense, but the best way to influence up is to use these things, and quietly go about doing your job more effectively. Then, have people say, what changed you? And say, actually I use these one-on-ones and coaching and feedback skills and I've learned how to present and so on. I use

Manager Tools, and I suggest you try it and see if it works for you. And, you know, you start getting promoted. What a clever way to influence up the organization: get promoted a couple of times by doing your job better.

Michael Auzenne: And this stuff is not all theoretical, right? We talk about this stuff because it works.

Mark Horstman: Yes, members have gotten promotions. They write us and tell us that Manager Tools helped them get the promotion.

Michael Auzenne: It's effective. So, given that it is effective, if you do it properly, people will notice. There's no doubt about it. Like you just said, we've had several listeners call us, write us and tell us that they got promoted as a result of doing this stuff, that their bosses noticed, their subordinates said, man, last couple months you've just been...

Mark Horstman: **...**quite good…

Michael Auzenne: ...an incredibly effective manager. How is that? Well, this stuff works, so anyways. Off the soapbox.

Michael Auzenne: OK, week four, boss one-on-ones, and that's assuming that you're lucky enough to have a boss that does one-on-ones with you, right?

Mark Horstman: Yep, that would be good. We're going to look for two things, and we're going to make notes on two things, from all of your paper one-on-one forms. By the way, this is a reminder, Mike, I think, now I'm sure there are people who will tell me no, Mark, it's much easier using technology, using a tablet PC or typing them up or whatever, but I really think that scanning them this way is easier on paper. To go through what amounts to, what, 20 weeks or 25 weeks of one-on-ones, if your boss does them weekly, I really think it's much easier to go over your notes from one-on-ones this way. If somebody has a different opinion, fine, but I think looking at them manually is much faster.

Mark Horstman: You want to look for two things: **accomplishments** and **issues**. Accomplishments, just because it's not as if your one-on-ones are nothing but your successes, but still, they are going to point you towards any projects you've forgotten about, small wins you had along the way. And again, hopefully this will make you want to keep better notes, because there will be a few things that bring up something else that you don't even have written down. So, it’s always better to take good, detailed notes in your one-on-one.

And then secondly, issues. You want to look over six to nine months of notes, and hopefully you're going to see themes in what your boss talks about. If there are themes, either about you or your team or your projects or your boss' pet peeves, expect to hear about them again at the end of your review. Take notes on them. Even if you can't combat them, Mike, if your boss says I require everybody's desk to be spotless...

Michael Auzenne: …I'm in trouble there...

Mark Horstman: …You can be thinking about how to address them, and maybe reengage on it with your team, so that at least you're making strides in that direction. All your other peers won't - they'll have forgotten about it. They’ll say, "Ah, the boss isn't going to care about that, that's not that big a deal." Sometimes it's doing everything one percent better that gets you the top nod, rather than hitting a home run in your top area. You want to be able to talk about all the things you've done well at the end of the year.

Michael Auzenne: Yep, and we've had many of our listeners ask about how do they get their boss to do one-on-ones, and of course, we've always said that, you can't do that, you just focus on doing them, be effective and people will notice. That's how you change things. But here's the downside, which is if they're doing one-on-ones, just like you are doing one-on-ones with your folks, they are going to have a written record of your performance and the goals and objectives and that coaching and all that, over the course of the last year. So, it would be a really good idea, given that they have that much more detailed information that you review it and go through it and at least refresh yourself as to what you've committed to do.

Mark Horstman: You know, I just thought about it, Mike, but insofar as these folks who are listening are doing one-on-ones with their teams, and they're probably thinking I've got to keep good, detailed notes, and if my team doesn't that's OK. If they feel like it's their meeting and they need to take good notes, but they don't approach it that way with their boss, gosh, you're right, you just pointed out that maybe they've got pretty light notes and their boss, as it relates to them and their team, their boss could have better notes and more data for the annual review than the manager tools manager does. So, good point.

Michael Auzenne: All right. Week five, team one-on-ones. Now, how does that affect your own personal review?

Mark Horstman: I hope this one is so obvious. Remember, you're the manager of your team. You get credit for what your team does, and what they don't do. It's not just about you, if you're a manager, it's also about everything your team did, because you're not supposed to be reporting on what you personally did but on what your team accomplished. Generally, you're going to make notes about three things: your **direct successes, your direct failures, and, again, projects**. Remember, you’re just gathering data.

Michael Auzenne: Hey, hold on one second. Before you do that, let me go back to direct successes, because I think there's something worthy of note here. I think a lot of managers, there is such an overwhelming feeling sometimes about the individual who claims credit for their subordinate's successes, and the feeling is, that most people feel that is a bad thing to do.

Mark Horstman: Yes, right.

Michael Auzenne: When it comes down to reviews, I just caution you about going too far. You have an influence on your organization; if your subordinates are successful, then you are successful. So, during the review is not the time to slight that.

Mark Horstman: In other words, it's not the time to be worried that you're going to be taking credit for somebody else's work. You're going to use the word "we," perhaps, but you're not going to be stealing their thunder and presenting it as your own work.

[There’s a difference between presenting someone else’s work as your own and acknowledging that you’re responsible for your team. – H]

Michael Auzenne: Yes, yes.

Mark Horstman: It's ok to talk about what your directs did, because in the same way that you roll up to your boss and he or she's going to be essentially getting rewarded for the fact that the organization did what it's supposed to do. So good, I'm glad you said that, because you're right, that is a huge concern that people have, among managers who are unethically taking somebody's work and then positioning it as them and then calling it "I, I, I."

Michael Auzenne: Use "we." The fact is, you are responsible, and you deserve some of the credit for what your organization does. That's your role as a manager.

Mark Horstman: OK. Directs' failures as well. Maybe it shows up in your one-on-ones with your boss, but just in case, make notes about coaching and feedback that you've given your team about stuff they haven't done well. You want to be ready to talk about failures, so you want to have them in the back of your mind if your boss brings them up. The key is if you think about them now, you'll be able to talk to him or her about how you overcame or made up for them later in the year. That's another reason why there's value in starting this process early, as opposed to doing it in the "oops, it's Thanksgiving, I'd better write my review" mode.

Mark Horstman: And then lastly, projects. Bosses love asking about a project that was left dangling in May, when it's December. Capture what your team has been working on, even if it doesn't seem to have been finished in some way, and either finish it, or start thinking about what to do to overcome the fact that you won't have it done at the end of the year because it was canceled or was put on hold or the customer put it on hold or whatever. Rather than you looking like a deer in the headlights when they say, "Well gee, we did have seven projects we were going to work on this year and three of them just seemed to die in May and June, why is that?" Well, there were good reasons for that, and if your boss thinks about it, now your boss has 10 you need to be able to help her. So actually the customer put that on hold, and this one, we lost funding because we had budget cuts in the second quarter. You need to be able to talk about those kinds of things.

Michael Auzenne: Let me add one under team one-on-ones, particularly under projects. I'd encourage folks to **think about development of their people as projects as well**. I know in my experience nothing ever impressed me more than during a review or preparation for a review where somebody was sharing with me how they developed their people. So, when you're reviewing team one-on-ones, that's the time to get that in your mind and make sure your boss is aware of what kind of personal development stuff you're doing.

Mark Horstman: Perfect! I wish I'd have thought of that!! OK, week six. It's time to look at reports. Lots of bosses keep report files from their directs. I do. You should be able to find any operational, personnel, or budgeting reports that reflect on you and your team for the year. Whatever goes up weekly, monthly, quarterly, whatever. Do not underestimate this step because it's after one-on-ones and talking about emails. Budgets alone can kill you. You need to be able to have a detailed discussion about your monthly budgeting and its effects on your costs and benefits and your cost analysis.

Michael Auzenne: It is not coincidental that reviews that they happen at the same time you're going through budgets. If you have a problem here it's going to become very public at the same time people are thinking about the review. Pay attention.

Mark Horstman: Bingo. Your office is so far down in the weeds you need to look at the reports in this way half way through the year to see what the boss is seeing systematically about you and your team. If you're smart you're going to get your hands on your peers' reports that are similar to yours. So that you can compare you may not know how much better or worse than your doing than anyone else. Probably around the water cooler you get some sense of that. If you don't know where they are we have a little hint for you: your boss's admin has all of this for you. If you're really smart next year you're going to keep all your peers' reports that you normally throw away and if you have an admin you're going to say keep a file on all my peers' reports monthly. Keep a monthly file so we can look at these reports for the end of the year review.

Michael Auzenne: You're such a sneaky guy.

Mark Horstman: It's almost as if all this stuff fits together as though we've been thinking about it for years and years and years. ;-) We are looking for successes and failures where you met your goal and where you didn't but we're not suggesting that it's only that. You want to be looking for how you're communicating all this stuff in your review. You're going to be writing notes down and when it comes down to it you're going to be steep in this stuff.

Mark Horstman: A little caveat at this point. Many folks who are listening are going to be thinking about quitting the process right about now. It'll be because you have a mass of data in front of you telling you about a bunch of stuff you haven't done that you said you were going to do. All the metrics you were letting yourself off the hook for throughout the year because things change and stuff moves too fast.

My thought on that is simply this that was probably true last year too - you just didn't do a mid-year review or an August review of your work. It's better to know what you're weak on or a little behind on now than to have your boss tell you about it in December or January. It may be a little bit disheartening, but if this year is like the others you'll be let off the hook at the end of year. You want to talk about what you were successful on and if you don't go through this process you won't be ready for that.

Michael Auzenne: The huge advantage of this is something we're not even going to get into in a lot of detail. This serves as the **basis for improving your performance next year**.

Mark Horstman: You could cheat a little bit and start now and sweep up loose ends this year as well. Okay, week seven, documents created. I love this one. A friend of mine in sales showed me this. He had a new boss and his new boss spent the year asking him for new reports, documentation, training guides for new representatives that my friend was training. He did this to show his boss that yes, he had told him to do all this stuff. Sales people and sales managers tend to have short memories on everything but clients. "I didn't ask you to do that did I?" "Yes you did and here's the document I had to create late one night and over the weekend in order to train this rep so we didn't have to reinvent the wheel late next year."

Mark Horstman: Basically it got to me thinking about searching on your computer. You can use the search function in Windows or the Mac. I happen to love Google Desktop. In Windows Explorer you could organize a folder by date created or do a search using windows search function, which is horribly kludgy. Ask it for every document created in the calendar year thus far. You'll want to do this again towards the end of the year. I was amazed at stuff I found on my computer when I did this a couple of times. All the stuff you forgot you worked on that you might want credit for. Sometimes it doesn't make the one-on-one and there's a document you spent a weekend preparing or a slideshow you made for your boss when she was on vacation or in a conference.

It won't hurt you to print them out if you think it's necessary or you can just make some notes in the form that talk about the successes they brought you or what work you did that helped someone else in terms of team building or supporting your boss or supporting an initiative in the corporation. A lot of time it doesn't have to deal with something in the chain of command – it may be something that managers are expected to do when serving on a committee, for instance.

Michael Auzenne: One additional point on the documents is take the extra step and deliver the document, then think *what effect did it have on the organization?* You want to be able to put it in that context, versus "I created it."

Mark Horstman: You're not saying, "I typed 55 pages for you," actually. You want to talk about value creation. Weeks eight, nine and ten we get to the fun one which is email. To tell you the truth although this is the best repository of data and reminders of stuff you've forgotten, it'll probably get a little bit boring. You're going to get a few surprises you go through a years or nine months of email you'll go, "Oh my God, that fire we put out in February. It took me three weeks to fight that fire and I had completely forgotten about it"… because your memory is kind to you.

Michael Auzenne: I think most of our listeners will probably agree we try to help them get out of this. A lot of your time as a manager is spent fire-fighting. Those are things not reflected in your job description and objectives - there's no other documentation other than email in general. Given that you're spending a lot of your time doing it, you might as well cull it out and make sure you're getting credit for it.

Michael Auzenne: Not to repeat myself ten-thousand times but this is the basis for future improvement. You go through this process, and you'll have a better review and have a better sense of what you've done and your weakness and what you need to improve next year than you ever would get from your boss.

Mark Horstman: The way to do it is to sort your emails by person - that's important. If you go through them by date there are too many threads to keep track of, in my experience. You get going too fast and you forgot to write down all the threads and you have to connect things later. You have to keep going back and find whom the email is from. By person, the threads appear a little more naturally.

I take it a step further and make copies of all the emails that I sent to folks. I put my emails to them in one folder and then I sort by them date within that person's folders so I can follow the threads between them and me that I'm coming up with. Now, you may choose to do it differently, but most managers I know do it one person at a time than focusing on time and everyone in the same box. Another thing it does, Mike, is it identifies team member successes and gives you a chance to write down a portion for the one-on-ones and write down the team members' successes. A little hint about email is to sort for peer emails, internal or external emails, and projects if you can identify them. So you can look for ups and downs in projects along the way. Very powerful - you'll see little things you forgot along the way. Maybe only one or two make it into the review but at least you'll know completely. Email is an absolutely great repository.

Michael Auzenne: I can guarantee that someone who did this would find half a dozen accomplishments that they'd otherwise completely forget - no doubt.

Mark Horstman: They're probably thinking to themselves they must not have been that important because I haven't been thinking about them. Well it depends. Are they important to you or the boss? Could it be that four or five additional accomplishments make your boss realize that you had a great year? It's like going in with a revolver that should have six bullets and you only have three. If you could have six wouldn't you want to have six?

Michael Auzenne: Yes you would. Weeks 11, 12 you can prepare your review package. Now we're getting to the good part.

Mark Horstman: The good part or the hard part? There's no easy way around the writing part but imagine doing this step if you haven't gone through the first ten weeks we walked everyone through.

Michael Auzenne: But really, it's easy.

Mark Horstman: It's easy because we already told everyone how! Just go to last year's cast on how to write someone else's review you have all the data you need you're just writing your own. It is not hard at all. Remember the SEER method: summary, example, elaboration, result. Or the

SUM-EX method: summary, example.

Michael Auzenne: We'll be able to figure out whether or not people are listening to this or not because we'll see an uptake in the downloads of last year's shows.

Mark Horstman: There is one caveat I don't recommend, Mike. I don't recommend you try to figure out what your "core message" is for your own review. If you're thinking your boss may have one for you, certainly if she's a manager tools manager, by all means think about that and be able to support or refute it if there's a concern for you. I wouldn't try to write one normally, though, because you're probably not going to influence your boss's decision on your core message, *unless you hit a home run with your number one project or metric*. In that case, fine - talk about that and make it a core message. Otherwise write it without that and allow the data you provide to influence them.

Mark Horstman: After you've written it, add any documentation that really stands out to you as an addendum. A couple of documents, maybe four or five, maybe even ten, if you feel that they are that important *[though ten would surprise me – H]*. If you've gotten it done in time, hand it to your boss within 24 hours of when your boss has gotten a reminder to do the review. Imagine this: "Hey, boss, I hear you're getting ready to do my review. Here's my packet." Watch your boss's mouth just fall open. She's thinking, here's somebody who knows how to manage themselves.

Michael Auzenne: You just took twenty pounds off their shoulders.

Mark Horstman: You're going to get the benefit of the doubt on any close call. You're going to have a significantly better review because you spent six hours on this in the course of three months.

Mark Horstman: Now, final point. We promised everyone a resume bonus on the end of this cast and we may have already given this away. Now that you're done with your review, if you haven't done your little bit of work each quarter on your resume take all your notes about the entire year and that review you just wrote and update your resume in your most current job. Now your resume is current. That might be a good thing if your review goes badly. ;-)

Michael Auzenne: Way to end on an up note! This is fantastic stuff. We have got a bunch of stuff that we're going to put on the website in terms of forms and transcripts and all of that. That will make this very, very easy to implement. You won't have to have taken a lot of notes during this podcast. That's a good thing.

Michael Auzenne: Now everyone has a process for how they're going to prepare for their reviews every year for the rest of their careers.

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