**Steps to Prepare for Your Performance Conversation**

**Step 1 – Gather Relevant Documentation**

* Job description
* Last year's performance evaluation
* Reports you've created
* Samples of your work
* Notes from regular update meetings
* Accomplishments/activities log
* Emails/correspondence you received
* Input from others who have worked with you
* Training and development activities you’ve completed
* Recognition, awards, etc.
* Current projects you are working on and your progress

**Step 2 – Prepare Your Self-Appraisal**

Allow yourself about an hour and a half to two hours to complete the self-appraisal and prepare for your performance conversation. Conduct the self-appraisal in a quiet place without interruptions so you can devote your full attention and reflection to the process.

* Review your job description
  + What major responsibilities are you performing that are not included?
  + What responsibilities are you not performing? Why?
* Prepare a list of accomplishments using the method to have the greatest impact.

**Review each STAR point to process your goal assessment**

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| --- | --- |
| S | Describe the **SITUATION** or problem encountered. Provide the context. |
| T | What was the specific **TASK**? What was the challenge or problem? What were you working toward? What limitations, complexities, deadlines were you up against? |
| A | Describe the specific **ACTION** you took. What did you do? How did you do it? Consider actions that fall in these categories: degree of difficulty, one of a kind, first-time, high-visibility, large volume of work, deadlines, competing priorities, innovation required. |
| R | What was the **RESULT** of your actions? What was the impact? Quantify – savings, accomplishments, recognition, etc. |

Keep track of your accomplishments throughout the year. Recording your activities, accomplishments, successes and challenges as they happen helps you capture details while they’re fresh in your mind. It will also make your preparation for your next performance appraisal faster and easier.



Listing accomplishments and strengths is your time to shine. It’s an opportunity to boast with grace and diplomacy without putting any of your colleagues down or taking credit for someone else’s work. Don’t be modest; state your accomplishments objectively and accurately.

|  |  |  |  |
| --- | --- | --- | --- |
| SITUATION | TASK | ACTION | RESULT |
|  |  |  |  |

**Evaluating your data using the STAR method**

* Identify goals that were not met and projects/assignments that were not completed.
* What challenges or barriers prevented you from meeting goals and completing projects/assignments?
* What strengths did you use?
* What areas are in need of improvement?

*Be objective and honest in this area. No one is perfect. It’s okay to admit mistakes or areas in which you struggled, but mitigate them by describing how you overcame the challenges and acknowledging what you learned or the steps you will take in the year ahead to address them. Don’t be afraid to mention ways you can do your job more effectively—ways in which you can grow and improve.*



**Supervisor Questions**

* Is there anything your supervisor can do to help you succeed?
* What other issues/topics do you want to raise with your supervisor?
  + What feedback would you like to give your supervisor?

**Step 3 – Prepare for Your Performance Conversation**

* Share your self-appraisal with your supervisor
* Think through the conversation you will have with your supervisor
* What reaction do you anticipate from your supervisor? How have your previous meetings and conversations gone?
* What positive feedback do you expect from your supervisor? How will you react?
* What constructive feedback do you expect from your supervisor? How will you react?
* What do you need from your supervisor or want to ask him/her to do so you can be successful?