

**Performance reviews and career conversations with our managers can sometimes get a bad reputation for being intimidating, frustrating or simply a process we HAVE to do.** And while yes, no process is perfect in every way, these types of conversations can provide a tremendous opportunity to build rapport with your manager and demonstrate ownership of your career.

It is also a time for reflection and stepping outside of the day-to-day of your role to celebrate accomplishments, identify potential areas to continue to develop, address challenges/voice concerns, map out what supports and learning opportunities are needed to help you excel, and set goals for the coming performance period.

Your attitudes and behaviours are often directly correlated to the level of benefit you experience from the process – so positivity, openness, preparation, and readiness are all things to focus on to maximize the impact of your conversation.

Below are some tips to help you do this.

### 1 Understand the Benefits

It's likely that you are doing the best you can in the environment and circumstances you are working with. These conversations are designed to help you and your manager work together to help you to 'be better' and excel in your role. The focus is on how you have demonstrated your skills, benchmarked your performance within your team/organization, identified what you need in order to be successful, and set your short and long term goals.

Here are a few of the benefits that can come from the appraisal and career conversation process:

- You should know how your manager perceives your performance and, ultimately come to agreement about where you are in your career path.
- You should have a clear understanding of what you are working to accomplish in an upcoming period and leave with a plan to optimize your performance on-the-job. This can include a set of well-defined objectives, a personal development plan, and a sense of steps you can take to work towards your career goals.
- You should have commitments from your manager about what you could receive to maximize your performance and further your career – i.e. coaching, training, mentorship, financial support for learning/knowledge building, stretch assignments, etc.
- You should have discussed and addressed challenges, obstacles, and/or relationships that might need to be addressed to help you be as successful as possible.
- You should have a written record that both you and your manager will sign. This is a helpful guide to review and reference periodically to ensure you are both keeping on track with your commitments and objectives.

## 2 Understand What Makes the Process 'Work'

There are many ingredients that go into this process. Here are a few of the main ones:

- **Both individuals are prepared.** You are professionals who work alongside each other every day. Treat this like any other meeting – you likely would not go into a planning session or strategy meeting without doing your homework. So, model that same behaviour coming into this process.
- **Be an active participant.** Often we think that we just have to let the process happen. After all, you are not in the driver's seat, right?! No. This process should not feel like it is being 'done to you', rather it is a two way street. Ask questions, express your own self-assessment (be sure to use concrete examples) of where things sit, offer opinions/ ideas, and seek clarification where needed.
- **No surprises.** Like any element of your role, your preference is likely not to be blindsided or overly surprised by something. Performance reviews and career conversations are most beneficial when they are approached in the same way. These meetings should be a review of where things are at – so, whatever is discussed should have already been surfaced and talked about in some way. Not all employees and managers are skilled in this regard. However, you can be proactive by initiating conversations and regularly (e.g. every couple of months) seeking feedback on your performance and career goals.
- **Keep an open mind.** Your attitude and approach can define how a performance review or career conversation will go. Try working from a place that you and your manager are committed to your success, his/her success, your department or organization's success, continued development and growth, and a great career. Avoid entering the discussion thinking it is a war that must be fought, lacking ownership of the process, or viewing it as taking away from time on the job. In those cases, nobody wins. Especially you.

## 3 How to Prepare for the Conversation

Here are a few things that you can do to help you prepare for a fruitful performance review or career conversation:

- **Understand and set clear expectations about what is going to happen.** Often, the best time to clarify this is when the meeting is being booked. If you are initiating the process, you will want to outline what you are seeking to discuss and ways that your manager can prepare for the discussion. Conversely, if your manager is setting up the meeting, don't hesitate to ask what the process will entail and how you can best prepare for the conversation.
- **Take some time to reflect.** Self –awareness and assessment of where you are in relation to your performance and career goals can help you in setting the tone for a mutually beneficial discussion. Because you have already thought about it and done some 'homework', you are not just reacting or going off the cuff over the course of the discussion. Rather, it is anchored in concrete examples.

You can get this process started by asking questions like: What are the key things I have contributed over the last year? What parts of my job have not gone as well as I would have liked? Are there any particular things I want to work on or continue to develop? How might your manager help you in optimizing your performance/realizing your career goals?

You might also find it helpful to complete additional assessment tools on the **mycareer** website and benchmark where you are based on the career map most relevant to your current role.

- **Be solutions focused.** If you are identifying challenges in your role, supports you would like, learning you would like to pursue, or experiences you would like to have to further your career – be sure to come in with ideas about how these can be actioned in a realistic and impactful way. Sometimes it is easier for a manager to react to something, rather than just look at it as a blank slate. This will also demonstrate your commitment to your needs and goals – and, to making it work in the best interest of everyone involved.

## 4 What to Do During the Conversation

Take a deep breath... This process is a positive thing. Remember, it is not intended to be punitive, nerve inducing, or uncomfortable. Your manager might even be a little nervous about it too. Do your best to make yourself and your manager as comfortable as possible. Here are some suggestions:

- **Be conscious of your tone and body language.** Like any meeting or interaction with colleagues, your demeanor and tone can say a lot. Do your best to assume an open posture, project positivity, and keep your tone in check.
- **Be engaged and guide the conversation.** Remember, that this process works best when you are an active participant. Ask questions, seek clarification, and try to guide the conversation in ways that are enabling you to achieve your goals
- **Focus on going forward.** You may be receiving some feedback on what needs to be improved or what might not have gone as planned. In this context, rather than focusing on the negative, you might choose to ask “How can I prevent this issue from emerging again in the future?” Together you and your manager can work from a future forward perspective versus focusing solely on what has happened in the past.
- **Ensure you are leaving on the same page.** As the meeting concludes, ensure that you both have an understanding of next steps and what you have committed to. This should be captured both orally and in any documentation that your company uses to support the performance and career development process. You might initiate the conclusion of the meeting by saying something like “Before we finish, I want to make sure we are on the same wavelength, so, can I summarize what I think has been said?”

### 5 Understand How You Will Handle a Disagreement

Sometimes, you may disagree with your manager's assessment of your performance or career development. This does not necessarily equate to a bad thing. But, it is important that these disagreements do not permeate into your day-to-day relationship or leave you with a negative impression of the job/company.

Keep the following in mind when you encounter a disagreement:

- **Get specific.** Have your manager walk you through their assessment and provide concrete examples. This will help you get a better sense of their perspective and helps to make the assessment less subjective and more meaningful. You may find that after getting specifics and clarification from your manager, you are more aligned than you think or at least have some strategies for what to do going forward.
- **Keep an open mind.** This is a common ingredient to all aspects of these types of conversations. Focus on getting enough specific so that you can try to address your manager's concerns going forward. Even if you disagree, you can at least demonstrate a commitment to self-awareness and optimizing your performance.
- **If you truly disagree...** add a note to the paperwork that your company uses to support these conversations stating why and providing concrete examples to support your case. If the misalignment is severe enough or is going to impact your ability to be at your best on the job, you can consider escalating the issue (i.e. to HR or another appropriate business leader). However, do not do this without discussing it with your manager first. Going over their head will likely only result in greater conflict.

Remember, you 'own' your career. By taking an active part in these kinds of conversations and following through on the resulting action plans, you are projecting a strong personal brand and are far more likely to feel satisfied in your career.