

# Performance Review Process:

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## Self-Assessment

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## Why Should You Put Effort into Your Self - Assessment?

- ✓ Self - Assessments are an opportunity for you to showcase to your manager what you believe are your greatest successes and contributions to the organization.
- ✓ A Self – Assessment is your chance to make your manager aware of the contributions you make that they might not be aware of.
- ✓ Self - Assessments help you and your manager identify your strengths as well as opportunities for skill improvement.
- ✓ Your feedback gives managers visibility into your professional aspirations, of which they might otherwise be unaware.
- ✓ A well thought out Self - Assessment, identifying how you could contribute more if certain skills were improved, in addition to highlighting your assets, is a way for you to express a commitment to your organization.
- ✓ Your insight helps managers identify where they can allocate more resources to improve your skills and performance.

# Performance Review Process: Tips for Completing a Self - Assessment

## ➤ Prepare

- Before writing your self-evaluation, take time to think about your performance this year.
- Make a list of areas in which you have shined and consider areas in which your performance could have been better. Consider these things in the context of your job description and the goals set forth for the review period.
- Gather scorecards or other documentation that quantifies your performance against measurable goals.
- Be self-aware. Take time to reflect on the competencies and behaviors you reflect to others. Ask your peers and business partners for constructive feedback. Feedback allows us to better see our own strengths and weaknesses.

# Performance Review Process: Tips for Completing a Self - Assessment

## ➤ Show, Don't Tell

- Rate accordingly. It's okay to pat yourself on the back! At the same time, don't overstate your accomplishments.
- When talking about areas in which you met or exceeded expectations, use ***specific and measurable*** examples of just how you did so.

## ➤ Address Shortcomings

- Were there some goals you fell short of reaching or other weak spots in your performance? Be honest about them on your self-evaluation.
- Take areas for opportunity a step further by demonstrating, with specific examples, what actions you took to address them.

# Performance Review Process: Tips for Completing a Self - Assessment

## ➤ Set expectations for your future

- Developmental goals may reflect the desire to progress to roles of increasing responsibility or to perform better in your current role.
- Set realistic and specific goals for yourself and highlight skills that you would like to develop, and present a practical plan for how you will achieve them.
- Your manager might have different ideas, but at least he or she will know that you're thinking about your future with the company and how you can better serve it while moving your career forward.

# Performance Review Process: Self - Assessment Do's and Don'ts

## ➤ Do's...

- Be honest and objective about your skills, commitment to work, and interaction with other employees.
- Be able to support why you believe your self-ratings accurately reflect your performance by offering specific examples that illustrate your viewpoint.
- Frame your performance against your impact on organizational or department goals.
- Highlight areas where you have exceeded expectations.
- View the Self-Assessment as a tool to identify development needs in order to improve them. Detail steps that you can take to improve your performance in areas you believe need improvement.

# Performance Review Process: Self - Assessment Do's and Don'ts

## ➤ Don'ts...

- Provide unbalanced feedback. This is your opportunity to highlight your successes, but you should also be candid about areas that need improvement.
- Use generalized or ambiguous language when describing your strengths and development areas.
- Be overly modest about your contribution to your organization. This is your opportunity to highlight your successes.
- Gloss over or ignore areas where you need to improve your skills or performance. Your manager is likely aware of them and will appreciate your candidness.
- Blame your company, fellow colleagues or manager for your areas for development.

# Performance Review Process: Review Rating Guide

<b>Excels at Position Requirements</b>	<ul style="list-style-type: none"> <li>• <u>Consistently exceeds</u> performance standards</li> <li>• Continuously contributes to the Bank’s success by adding significant value</li> <li>• Measureable achievement exceeds stated target</li> <li>• Demonstrates a comprehensive understanding of work; takes action to identify needs and solve problems</li> <li>• Serves as role model for others in that role</li> <li>• Takes on additional responsibility</li> </ul>
<b>Achieves Position Requirements</b>	<ul style="list-style-type: none"> <li>• Successfully meets performance standards</li> <li>• Competently performs all aspects of job functions and meets performance goals</li> <li>• Is a valuable and contributing member to the Bank’s success</li> <li>• Takes accountability and ownership for position requirements; capably adjusts to set backs</li> </ul>
<b>Needs Improvements</b>	<ul style="list-style-type: none"> <li>• Fails to perform most aspects of the position</li> <li>• Performance levels are below expectations or stated performance targets</li> <li>• Requires close guidance in performing routine job duties</li> <li>• Requires a Performance Improvement Plan to address areas of development with progress review dates</li> </ul>



# Performance Review Process: Important Reminders

- Complete all sections of the Performance Review Self - Assessment thoroughly.
- Be timely in the completion of your Self - Assessment.
- Don't worry about whether your Self - Assessment will be the same as your manager's assessment of you so long as you can justify your personal opinion of your performance.