



Performance Review Checklist



Before Your Review

- Review your job description and self-evaluate your performance against each criteria.
- Identify if you are managing more responsibilities than are listed in your job description. Only list them if they're substantial and try not to be petty.
- Audit your strengths and weaknesses. What are you good at? What do you need to improve? Don't downplay your skills and abilities but acknowledge where you can improve. Consider both your job skills but other transferable skills you have that can help the business:
 - Technical skills (certifications, qualifications, analytical, practical)
 - Communication skills (verbal, written, editing, digital communications, languages)
 - Relationship skills (listening, empathizing, self-awareness, team-work)
 - Executive skills (time management, planning)
 - Leadership skills (persuasion, confidence, conflict resolution, decision-making)
 - Creativity (innovation, problem-solving)
- Identify and summarise what you have done well in the last 12 months and gather your supporting evidence. This could include positive feedbacks, written references, positive work related social media posts.
- Sound out you manager about the them out about the business, what it wants to achieve in the next year and whether there might be opportunities for you (based on what you want).
- Think about what you want. Is it: a pay rise, more flexibility, a promotion, or further training. You need to think about how are you going to sell this to the business? How can you help the business and help yourself at the same time?
- Rehearse the conversation, so feel comfortable with asking for what you want.



At Your Review

Ask questions about your employer. Choose a selection from the following list:

- What goals does the business want to achieve in the next 12 months? Growth? Reduce costs? More customers? Happier customers? New systems? More competitive? New products?
- What problems does the business have that it wants to solve?
- Does the business have any skill gaps it needs to fill to achieve its goals?
- Is the business willing to upskill employees and promote from within?

Present and discuss your self-appraisal. Be authentic and mature in how you discuss your strengths, achievements and limitations. How have you learned from your mistakes?

Clearly state your goals for the business and how you will create a win for you and your employer if they support you to achieve your goals.

Ask for what you want, but frame it in a way that shows how you will help the business achieve its goals (greater engagement, more income, happier customers, less costs, growth, more competitive, new products)

How to Ask for More Money

- Think about how you have helped the business achieve its profit goals. Have you achieved your goals/targets? Have you helped others achieve their goals/targets? Have you improved your efficiency, grown customer base, improved customer service, launched new products.
- Scope your role. Are you doing more than you're being paid to do. Only include significant tasks and forget the minor jobs.
- Consider asking for a performance bonus in lieu of an increase in your base pay. That way, you spread the risk with your employer. But be very clear about what level of performance earns a bonus (your KPIs), how and when the bonus will be paid.
- Source the salary benchmarks for your role and industry. See how your salary measures up against the benchmarks. If you can't find this information online (try SEEK or LinkedIn), check with your industry peak body or union or speak to a recruiter in your industry.



How to Ask for More Flexibility

Think about how you can be more flexible at work without jeopardising productivity. Consider:

- Hours of work (start and finish times, days of work)
- Patterns of work (shifts, job sharing)
- Locations of work (work from home)

Prepare a business case on how you can work with greater flexibility while supporting the business.

How to Ask for Training

Research the courses you would like to do. Find out:

- How much they cost?
- When are they run?
- Where they are run (online or in-person)?
- What are the learning outcomes?
- Most importantly, identify how it links to you becoming a higher performer for the business?

When it comes to training most employers are happy enough for you to do it BUT it is still your responsibility to “paint them a picture” of how the business will benefit from the expenditure.

How to Ask for a Promotion

- Review your job description and self-assessment. Make sure you can demonstrate mastery of your current role.
- Have a conversation with your manager before your review to sound out the opportunity and your potential for promotion.
- Prepare your business case to show what the business wants to achieve, how you can help them do it and your 100-day plan in your new role to achieve quick wins for the business.