

# Annual Review Planning Worksheet



Year: \_\_\_\_\_ Date of Review: \_\_\_\_\_

Date/Time of Work block 1: \_\_\_\_\_

Date/Time of Work block 2: \_\_\_\_\_

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## Take Action!

### STEP 1: Know how you're being assessed.

Timing: As soon as possible.

Review the form that will be used for the review. Ask HR or your manager for a copy.

### STEP 2: Solicit feedback.

Timing: 1 Month before the review.

Ask your colleagues for positive and constructive feedback. It's best to get it in writing, but you may also capture it in an informal discussion.

### STEP 3: Reflect and list out your Top 5 Accomplishments.

Timing: 2 Weeks before

Sit back and think about what 5 things made the greatest impact in your job. List out evidence to support these accomplishments.

#### My Top 5 Greatest Accomplishments

**Accomplishment #1:** \_\_\_\_\_

Why?

\_\_\_\_\_

\_\_\_\_\_

What I did:

\_\_\_\_\_

\_\_\_\_\_

Impact it made:

\_\_\_\_\_

\_\_\_\_\_

**Accomplishment #2:** \_\_\_\_\_

Why?

\_\_\_\_\_

\_\_\_\_\_

What I did:

\_\_\_\_\_

\_\_\_\_\_

# Annual Review

## Planning Worksheet



Impact it made:

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**Accomplishment #3:** \_\_\_\_\_

Why?

What I did:

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Impact it made:

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**Accomplishment #4:** \_\_\_\_\_

Why?

What I did:

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Impact it made:

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**Accomplishment #5:** \_\_\_\_\_

Why?

What I did:

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Impact it made:

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### **STEP 4:** Calendar Review.

Timing: 2 Weeks before

Sometimes the hardest part of preparing for a review is remembering what you did over the past year! Spend 20 minutes reviewing your calendar. What meetings did you attend, discussions that we scheduled, work blocks that took place? Take notes and use this information as support.

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NOTES \_\_\_\_\_  
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## **STEP 5: Make a 1-page career goals and development plan.**

Timing: 1 Week before

List out what you aspire to be in 1-year, 5-years, 10-years. List out your strengths and weaknesses. List out your work-life balance considerations. List out how you have been working to develop yourself (ex. Books you read, classes, projects you have led).

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## **Ready to Go!**

### **Bring to your review:**

- 1-Page summary of the feedback you collected from colleagues
- Overview of your 5 Greatest Accomplishments
- Your 1-page career goals and development plan
- An agenda of what you would like to cover in the review

### **After the review:**

- Celebrate!!!
- Carve out 1 hour to add your 5 greatest accomplishments to your resume
- Send thank you notes to colleagues for their feedback
- Carve out an hour to tackle your new professional goals for the year

### **Sample Review Agenda (feel free to adapt and make your own)**

- I Introductions by Manager
- II Overview of your top 5 Accomplishments and Evidence
- III Manager's Assessment, including ratings and compensation
- IV Discussion of Positive Feedback
- V Discussion of Development needed
- VI Present and discuss your Goals and Development Plan  
- Ask your Manager to support you in achieving your goals.
- VII Thank You and Next Steps