



Performance reviews and objective setting



MASTERCLASS WORKBOOK

The Assistant Room Members



Exercise 1

Strengths are attributes that come naturally to you and when you use them they give you energy. We can all learn different skills, but a strength is often at the heart of you. When you ask someone to describe you in just a few words, they will probably use your strengths.

Look through the list of strengths below and highlight the top 3-5 that you have and use the most, then complete the exercise below:

Self Control

You can hold your desires, emotions and impulses in check, when appropriate

Hope

You expect the best and have a plan to achieve it

Humility+Modesty

You are content to let your accomplishments speak for themselves and do not seek the spotlight

Zest

You approach life with enthusiasm and energy

Humour

You enjoy laughing, friendly teasing and bringing happiness to other people

Curiosity

You have a desire for new experiences and a thirst for knowledge

Appreciation of beauty + excellence

You notice and appreciate beauty, excellence and skilled performance in all domains of life, from nature to art and from science to the everyday

Leadership

You are oriented towards influencing and helping others, directions and motivating their actions towards collective success

Creativity

You produce original, novel or unusual ideas and you are outstanding at finding novel and productive ways to achieve your goals



Teamwork

You excel as a member of a group as you are loyal and dedicated

Gratitude

You are aware of and thankful for the good things that happen to you in life

Persistence

You have the mental strength to continue striving for goals in the face of obstacles or setbacks

Fairness

You give everyone a fair chance, you do not let your personal feelings bias your decisions

Kindness

You find joy in giving your time and doing good deeds for others, without expecting personal gain

Prudence

You are careful about your choices, you are far-sighted and exercise caution in life

Perspective

You take stock of life in larger terms and make sense of it to yourself and to others

Forgiveness

You forgive those that have done you wrong or offended you, accepting their shortcomings and give second chances

Social intelligence

You are adept at understanding the motives and feelings of yourself and other people, fitting into social situations with ease

Integrity

You are open and honest, living your life in a genuine and authentic way regardless of whether it is popular

Good judgement

You are willing to think things through, weigh up evidence fairly and not jump to conclusions

Spirituality

You have strong and coherent beliefs about the higher purpose and meaning of life, this is a comfort to you

Love + being loved

You value close relationships with others, you express love openly and make your loved ones a priority when making big decisions

Courage

You do not shrink from threat, challenge difficulty or pain. You step out of your comfort zone and face new experiences

Love of learning

You enthusiastically seek out new information, topics and skills for its own sake, not for an external incentive

Strength assessment

Strength: example - Zest

How do you know?	When do you use this strength the most?	What have you achieved in the last year using this strength?
I'm really enthusiastic and everyone comments on my energy	To push projects forward and get people excited by them	I got a difficult group of stakeholders to work together on a project

Strength 1:

How do you know?	When do you use this strength the most?	What have you achieved in the last year using this strength?

Strength 2:

How do you know?	When do you use this strength the most?	What have you achieved in the last year using this strength?



Strength 3:

How do you know?	When do you use this strength the most?	What have you achieved in the last year using this strength?

Strength 4:

How do you know?	When do you use this strength the most?	What have you achieved in the last year using this strength?

Strength 5:

How do you know?	When do you use this strength the most?	What have you achieved in the last year using this strength?

Exercise 2

It can be so difficult to step out of the shadow of your exec and focus on your performance, especially if you are trying to squeeze an entire year into an hour long conversation! It's important to prepare and think about everything that you have achieved this year. Remember, you may have been through a unique and challenging year, so make sure you put your achievements in perspective and give yourself some credit for the small wins!

This exercise is to get you thinking about the last year and your performance, so you go in with the right mindset. You don't have to share these with your exec but it may be helpful to have in your 'back pocket' when you go the performance review.

Your Achievements

Top achievements this year	Why?	Does your exec know about these?



Biggest Challenges

Biggest challenges this year	Why?	What did you learn from them?

Notes



Exercise 3

This exercise is getting you to prepare specifically for the performance review, so try and include your measures of success and think about your role in the achievement of both your own objectives and your exec/team.

Send this exercise to your exec ahead of the review so they can digest it and you can have a productive conversation about your performance.

Complete this for each objective or area of focus:

Objective 1:

Measures of success:
What great thing happened or what disaster didn't happen because you worked on it?

What was your role?
List what you did specifically

What feedback or evidence can you find?
Do you have emails from people at the time?

What score would you give yourself and why?

Objective 2:

Measures of success:
What great thing happened or what disaster didn't happen because you worked on it?

What was your role?
List what you did specifically

What feedback or evidence can you find?
Do you have emails from people at the time?

What score would you give yourself and why?

Objective 3:

Measures of success:
What great thing happened or what disaster didn't happen because you worked on it?

What was your role?
List what you did specifically

What feedback or evidence can you find?
Do you have emails from people at the time?

What score would you give yourself and why?

Objective 4:

Measures of success:
What great thing happened or what disaster didn't happen because you worked on it?

What was your role?
List what you did specifically

What feedback or evidence can you find?
Do you have emails from people at the time?

What score would you give yourself and why?

Objective 5:

Measures of success:
What great thing happened or what disaster didn't happen because you worked on it?

What was your role?
List what you did specifically

What feedback or evidence can you find?
Do you have emails from people at the time?

What score would you give yourself and why?



Exercise 4

You can structure the performance review however you like, but make sure you are the one to do it and you send an agenda out in advance.

This may feel odd, but this is the one meeting of the year that you need to be in the driving seat!

Here is an example that you can use:

1. Reflections and achievements this year
2. For each objective discuss
 - a. Successes (including your measures and evidence)
 - b. Challenges (and how you overcame them)
 - c. Learning (from your successes, your challenges and any formal learning)
 - d. Scores
3. What you want to keep and build on from this year
4. What you want to improve on and learn next year
5. What will help you do this

Exercise 5

When thinking about your objectives for 2021 here are some questions to get you thinking about where you want to focus your energy and efforts:

- What are you excited about in next year's plans?
- What do you want to learn?
- Is there an area / person / skill you want to work with in 2021?





Exercise 6

The objectives that you work on in 2021 need to interest and challenge you so you put the time and effort in, and produce your best work. It also needs to be aligned to the business priorities and the strategy. So before finalising your objectives with your exec complete the exercise below.

With each objective or idea that you have come up with, answer the following:

Objective 1:

How will it motivate you?

How will it stretch you?

What will you learn from it?

How will it help the business?

Objective 2:

How will it motivate you?

How will it stretch you?

What will you learn from it?

How will it help the business?

Notes

Objective 3:

How will it motivate you?

How will it stretch you?

What will you learn from it?

How will it help the business?

Notes

Objective 4:

How will it motivate you?

How will it stretch you?

What will you learn from it?

How will it help the business?

Notes

Blank area for notes.



Objective 5:

How will it motivate you?

How will it stretch you?

What will you learn from it?

How will it help the business?

Notes

Blank area for notes.





**Congratulations you
made it to the end of
your masterclass
workbook.**

**Good luck in your
performance review,
make sure you let us
know how you get
on!**