

End-of-Year Review Prep

A great end-of-year review is all about preparation. Whether you work in a corporate environment or you're your own boss, this is an opportunity to review how far you have come and prepare for the future. The deeper your self-assessment, the more you will get out of this process, whether you are doing a review with your manager, team, or on your own.

END-OF-YEAR PERFORMANCE REVIEW

DATE:

WITH:

YEAR-END STATEMENT

Your statement should describe your year in a sentence or two. It can be appreciation for opportunities you've had, progress you've made, how you're feeling about your role, your growth, etc.

ACHIEVEMENT OUTLINE

Success is often a collection of individual and team accomplishments. Each major achievement has its own story full of challenges, comprehensive planning, and extraordinary performances. Use this next section to recall and outline your achievements and the goals that you accomplished over this past year. Reference your notes, email, and calendar to help you map out key milestones and metrics. Put a star next to the achievements you are most proud of or had the biggest impact on the business. Add more details to these achievements to paint the full picture and write its story.

Q1 ACHIEVEMENTS/GOALS DESCRIPTION

RESULT/IMPACT

Q2 ACHIEVEMENTS/GOALS DESCRIPTION	RESULT/IMPACT

Q3 ACHIEVEMENTS/GOALS DESCRIPTION	RESULT/IMPACT

Q4 ACHIEVEMENTS/GOALS DESCRIPTION	RESULT/IMPACT

CHALLENGES & ROADBLOCKS

Recall any challenging projects or situations you encountered this year. How can these be avoided or addressed in the future? Where could you have used more support? Are there things you have learned or would do differently?

01

02

03

04

05

06

07

GROWTH & DEVELOPMENT

List a few areas or skills you'd like to explore, improve, or develop in the future:

01

02

03

04

05

06

07

