The ENGINEERING CAREER COACH PODCAST
SESSION # 9
Preparing for your Annual Performance Review as an Engineer

Show notes at: engineeringcareercoach.com/session9

Anthony's Upfront Intro: You are listening to the *Engineering Career Coach Podcast* with Anthony Fasano Session # 9. In this session, I am going to provide you with some strategy for preparing for your annual performance review, one of your most important activities in regards to career development as an engineer. Let's do it!

Episode Intro: Welcome to the *Engineering Career Coach Podcast*, where it's all about helping real engineers to overcome real challenges and get real results, and now for your host, who is on a mission to inspire as many engineers as possible; professional engineer and certified career coach Anthony Fasano.

Welcome to the *Engineering Career Coach Podcast*. This is your engineering career coach, Anthony Fasano. Welcome to the show everyone. I want to start by wishing everybody happy holidays and a happy new year. I really enjoyed this last year, 2013 but I'm very much looking forward to making 2014 my best year ever and hopefully your best year ever as well, through the strategies that hopefully that I'm giving you on this podcast. And again, I want to thank you for listening. What I like to let all my listeners know is that as a holiday gift from me to you, I've put together another long comprehensive guide on the website. If you go to engineeringcareercoach.com/engineersspeak, that's engineers speak. It's a comprehensive guide on how to improve your public speaking skills and your presentation skills, specifically for engineers. It's something that I've put together based on my experience, based on a lot of my research over the years and I hope it will be very helpful for you because one of the biggest challenges for engineers in today's world is effective communication. If you have an idea or design, and you're not able to communicate to people then really what good is it? So please enjoy that. It's there for you. It's totally free. It's comprehensive. You can bookmark it and come back to it as you like and I hope to create some more guides for you like that in the coming year.

So with that, today's show, I'm going to do something a little bit different today. I'm not going to have someone on the show to be coached. I'm actually just going to provide some coaching to everyone out there on a very important topic, your annual performance review. And this show was kind of spurred on by tons of requests that I've gotten in the last few weeks from members of my *Institute for Engineering Career Development* and other engineers through LinkedIn and other avenues, just asking me about the review. 'My review's coming up next week. It's annual review time, what do I do? How do I approach it? This is what I want to get out of it.' And I was a little bit frustrated because you shouldn't be thinking about your annual review a day or two before your review and that's one of the

things I'm going to touch on today. But I ended up writing a blog post about this, exactly last week and I'll post it in the show notes on the engineeringcareercoach.com/session9 so you can review the blog

post, but basically I wanted to do this show because your annual performance review requires more than just a blog post. It requires a lot of thought and preparation so I wanted to kind of base this show around the post and elaborate and add some more items to it. Because if you're not preparing for this then you're really doing a disservice to yourself and your career development. So with that list, let's jump right in and get started with our motivational moment.

Motivational moment: Alright, to kick off today's show, I decided to take a quote from Donald Trump and I guess you never know who I'm going to take quotes from for the show, but I thought the quote was perfect for the topic today. And the quote is as follows: *'In the end you're measured not by how much you undertake but by what you finally accomplished.'* Again, *'In the end you're not measured by how much you undertake, but by what you finally accomplished.'* And again, that's from Donald Trump. And the reason I like that so much is because a lot of the engineers that I talk to, a lot of the members of my Institute for **Engineering Career Development**, a lot of the people that come on the show, they're motivated and they take on a lot of things and they want be successful.

But what happens is a couple of things. One, we don't always finish them through to completion. And secondly, when it comes time for things like our annual performance review, we forget a lot of the stuff. We may have done something that we thought was trivial, but it might've been monumental to the company or to your department, to your manager. And by forgetting these things and not bringing them up in your review that can also hurt you and hamper your advancement. So I want to kind of get you in this mindset as we start, as I get into my next segment, where I'm going to go through different steps for preparation for your review.

I want you to remember no matter how many things you take on, it's really about results, what you accomplish and how you can present this to your company kind of throughout, through this annual performance review. Because you could take on every undertaking in the world, completing tasks and accomplishing real things that matter, not just to you, but also to your company then you're not going to see the results of that in your career, in the way you advance. So with that let's jump in to the main segment of today's show and walk-through some strategies for your annual performance evaluation.

Coaching Segment:
Alright now it's time for the main segment of our show, and today we're going to focus on preparing and actually going through your annual performance review. It's something that most engineers get annually, some of you out there might have it twice year. Some of you might work for smaller companies, who unfortunately don't offer annual performance evaluations - in which case, you should request one. You should approach your boss and say, 'I'd like to request a sit down just to review my

progress so I understand if I'm headed in the right direction.' Say it along those lines so they understand that you're looking for some guidance because it's very, very, very important that you measure yourself, and that's what I want talk about.

First, before we get into some of the strategy specifically, it's one of the things that I get challenged on myself because I like to do things and I like to be a doer and get a lot of things accomplished. But the problem with that is, we're always going forward and we never reflect on how the past has gone or what we've accomplished and the problem with that is that you can't learn from either mistakes or failures or even success for that matter. You can't learn what you did right because you don't take the time to kind of dissect it a little bit and take a look at it. And that's the opportunity that the annual evaluation performance affords you.

This April we're putting on an event through my *Institute for Engineering Career Development* and our annual meet-up in Austin, Texas on April twenty-fifth and twenty-sixth. You can check out at iecdmeetup.com. The reason I bring it up right now is our keynote speaker is Brett Harward, who is the author of the book, *The Five Laws That Determine All Of Life's Outcomes*. And one of the big topics in his book and one of biggest reasons that it really resonated with me so much was, measuring your progress. I mean think about it, how often do you just take a few hours or hour or a few minutes to just sit down and say what have I accomplished in the last week or the last month? Look at some statistics on it and look at it from quantitative measurement, however you want to look at it. Have you done that? Have you looked at your salary over the last few years and seen how it's increased? Maybe what's driving those increases? I mean you have to do that! Because if you're not measuring yourself, how do you know if you're headed in the right direction?

Ideally, you want to be able to set some clear goals, pursue them and then check on your measurement, your progress towards them on a regular basis. And we're not going to get into goals so much today. We're going to focus more on this reflection and the review. So let's jump right in here with some of these strategies.

The first one that's probably the most important is, you must prepare ahead of time for your annual performance review - it's critical. Alright, there's other people involved in this process besides, alright, your supervisors, anyone that's going to be involved with the actual review or preparing for the review and giving your supervisor input on it. In the company that I used to work for, they reached out for three recommendations through the review prep process, of people that I worked with, colleagues, managers to get feedback that they could use for the review. So all this gets done a few months before the review. So ideally, about three months before the review, you want to start to prepare. And I know most of you out there are saying, 'Yeah, right. I haven't even thought about mine yet and it's next week.' But I'm trying to explain to you on this show how to get the most out of it.

So three months before, you want to prepare. A minimum of thirty days before, you want prepare but the more time you give yourself the better. Because remember, whatever you do prepare and if you're

going to submit something to your supervisor to review, you want to give them time to review it and use it in consideration for a raise or promotion. What happens a lot of times is the company will give you a standard form, you'll fill it out and give it back to them a couple of weeks before the review. And what happens a lot of the time is that they've already decided on whether or not you're getting a raise or promotion and it doesn't depend on that at all because they've already decided. So how can they factor in anything that you said? So preparing ahead of time is very, very, very important.

As far as the next step goes, which is really reflecting and thinking about the year you've had in the past. That's part of your preparation. Think about the year that you've had. Brainstorm some of the accomplishments. Brainstorm some of the failures, some of the lessons learned. Quantify whatever you can quantify. If you brought a project to completion, a ten million dollar project, then quantified on a piece of paper, write all these things down. If you achieved your professional engineering license then write that down. If you've completed a Masters degree, or even three or four courses towards it write those things down. They're all accomplishments. Brainstorm every single accomplishment that you achieved in this last year and make sure you're writing these down, not just brainstorming them in your head or out loud. You want to capture this information either on your computer or just with a pad and paper.

Then you want to prepare a document. And for those of you that are IECD members out there, we did a detailed webinar last year on reviews and I provided samples of the document that I used to prepare. So if you're an IECD member, contact me through the network and I can get you a sample. You want to put together a document that kind of summarizes these accomplishments so that you can walk through them with your supervisor during the review, but also you want to submit it well in advance of the review as I stated earlier. So some of the things on the document might be the projects you're managing and their budgets, the proposals that you've submitted for and the proposals you've won - maybe with the quantity or the amount - some of the extracurricular activities that you partake in like an association volunteer or chapter president, an activity that you may have put together with your association (just again showing your involvement in the industry), any publications you might have had published, any accomplishments over this past year, any things that you're working on. Show them, quantify them in this document. This is something, just think of it this way, if your supervisor were to take this document and say, "Forget about the review, we're going to just review things when the time comes,' but this document we're going to use to evaluate Anthony's performance over this whole past year and decide on whether or not he's getting promoted or how much of a raise he's going to get, what his contribution to the company has been. That's what this document is all about. So it's very important. Take your time with it. Send it to someone else. If you're an IECD member contact me, we could do a coaching session, we can walk through it. This is very important.

And one of the things that you want to do is also emphasize the things that you've accomplished, but also talk about it in a team manner. Because it's not just about you, it's about the company. It's about

the company and the team succeeding. So I want to make that clear because I don't want people to think that I'm just telling you to write all this great stuff about yourself. I mean don't forget, the annual performance review is about you. I mean they're focusing on you. The questions that they usually give you are focused on and around you. It doesn't mean you can't talk about your team, what they've brought to the table, how they've helped you. And you want to do that, but what I'm saying is you've got to have a good balance here. I know a lot of engineers that are very humble, which is nice, but again, the squeaky wheel gets the oil sometimes. You've got to remember that. Now, you're going to submit this document in advance. Hopefully your supervisor will review it and consider it. Then you're going to have the actual review. One of things that you really want to be focused on in your review is being very clear on your goals. So what does that mean? That means you're going to have to understand what your goals are before the review, right. So that's part of your reflecting, your preparation. You want to think about those goals and goal setting is a whole other process that we're not going to get into today, but whatever your goals are, you have to make them clear to the company and to your supervisors in that review. They need to know what your goals. And to be honest with you, they need to have the same goals. They need to be lined up with you. Alright, so for example, I gave an example in the blog post - that I'll reference in the show notes here - and I'm going to use the same example because I thought it was really, really, really hit home. So for example, you might put something on this document and explain it to them in a manner, 'I would like to bring in about a hundred thousand dollars worth of new business to help increase our company's profit margin.' It's a great goal. It shows you want to get out there, you want to build the business. It affects the bottom-line; you want to help the company make more money, you want to develop new clients. But you don't want to say it in a way or write it in a way where you say, 'I'd like to bring a hundred thousand dollars in new business so that I can get promoted to the principal or the partnership position in this company.' Again, I've seen engineers do that as well and you have to understand this is, while the review's about you, this is a team sport, so to speak, so the company obviously wants to understand that you're on board for the team, that you're trying to help everyone. I think that's really important. It's really important to be clear with your goals so your supervisor understands where you're headed in your career, where you want to go and hopefully how they can help you get there. But you do want to communicate it to them in a way to show them this is a team effort, we're going to do this together and I'm ready to go.

Next, let's flip over to the other side of the coin. You also need to understand what is expected of you right. So you can't just go in there and tell your supervisors what your goals are without asking them, 'What do you expect of me this year? What goals do you have for me this year? At this time next year, what are you hoping that I've accomplished?' This is important and a lot of engineers don't do this. They go in there with their mindset, their approach and they don't really take the time to find out what their supervisors are expecting of them. And they don't always tell you this, so don't just expect them to tell you what's expected and make it easy and lay it all out. Alright, and the reason that this is so important is, think about it, if your goals for you are different than their goals from you, then there could be a problem. There could be some tension. There could be some negative energy and it could

cause problems down the road. A lot of times when I talk to engineers that are having issues in their career, whether they're stagnant or they're having issues with their supervisor, whatever the case may be, it's because of this. Because their supervisor's expecting them to do something else than what they really want to do, than what their goals are. The supervisor might be expecting them to start to take on a project manager role within the next year and the engineer's goal might be to really increase their technical knowledge over the next year. And so you have a disconnect there. So it's very important to keep this relationship open, honest, be clear on your goals and understand what's expected of you from your company.

Now the other thing you want to do, following up on those two points, is what ever your goals are for yourself and what your company expects from you, you want to make sure that you have everything that you need to accomplish those goals. You want to make sure you're in a position to succeed. So, before you go into your review, as much as you can prepare for this. Let's say one of your goals is to improve your technical knowledge and learn a new computer program, understand the training you're going to need, where you can get it, how much it's going to cost, and bring that up in the review. You don't just want to go to them and say, 'I want to accomplish XYZ next year.' You can say, 'I want to accomplish XYZ and these are the tools that I'm going to need to do it,' and lay it out for them so that three months down the road you don't go and surprise them with a thousand dollar, two thousand dollar training course and software and expect them to just go for it because you told them that that was your goal. The less surprises here, the better. Alright, so make sure you think about your training needs, your staffing needs, anything else that you possibly need to achieve either your goals, or the goals that they're setting for you. And you might have to think a little bit on your feet here because you may not know what their goals are for you next year. So they might say to you, 'Well, Anthony, next year we want you to start presenting in front of some of the town boards, presenting our projects for approval.' Then I might have to say, 'Well, listen, I appreciate that. I look forward to pursuing that goal, however, I haven't done a lot of presenting or speaking so I'm probably going to have to get some formal training for and hopefully you'll support me and sponsor me for that and I'll get some more information on it.' Very, very, very important.

As you go through this process and you start to wind out the review and get to the end of this meeting, you want to make sure that you thank your supervisor. I think this is important, because while the review is about you, I'm sure that your supervisor has taught you a lot and you've taken a lot from him or her. And I think that this annual review, in the crazy world that we all live in, everything is going at a hundred miles an hour - this is the one time or couple times a year where you get to sit down your supervisor and say, 'Listen, I appreciate you taking the time to do this review, but most importantly I appreciate all of the mentoring, all of the guidance that you've given me over the last year and I feel like a lot of my accomplishments have been achieved because of what you've given me.' I think this will go a long way in your supervisor appreciating you as well and looking forward to assist you more in your endeavors. Just like a lot of supervisors take their staff for granted, there are also engineers that take their supervisors for granted. Trust me I know because I know, I've talked to many engineers

that go to a different company and all of a sudden they're like, 'Wow, I didn't realize how great my last supervisor was, and now I have a lot less flexibility and things are a lot more difficult in my career.'

Alright so before we get to the career-changing tip for today, let's just review some of these steps to prepare for your annual performance review. First of all, you want to prepare ahead of time. I recommend three months ahead of time, no less than thirty days. And if they give you a form to fill out, that's fine, but don't be afraid to go above and beyond that form and prepare a solid document that you could submit or an addendum to the form. And then get that form in ASAP so they can consider that when considering your raise and promotion. Spend some time reflecting over your last year. Remember, we've got to measure ourselves so take the time to look at your accomplishments. Look at the goals you set last year and how you achieved them, or how you fell short of them and reflect on it, write some things down, brainstorm. And use this process to prepare that important document that you're going to submit to your company. Be really clear on your goals before you go in to the review And then make those goals very clear to your supervisor in the review, so that they're not surprised when you tell them six months from now that you're going to take a training course, or that you you're transitioning out of some of the technical roles. Make that very clear.

On the flipside, you also want to find out in the review what your supervisor is expecting of you over the next year. What goals do they expect you to hit? This is important because it keeps you on the same page with them, and there's no, again, there's no surprises. They may have a really big goal for you and you have no idea or they may have a goal for you, that's totally out of line with what you really want to do. And that needs to be addressed or you're just not going to be happy and neither will they, because you're not going to accomplish it.

You also want to be prepared with a list of items that you're going to need from them in order to accomplish your goals. So if you need training, software, whatever it is -- have a list of items, have some dates, pricing, whatever you can have for them is going to make it easier to get approved for those things, if it's flushed out in the beginning of the year.

And the last but certainly not least, thank you supervisor for their mentoring, their guidance. Give them appreciation and the respect that they deserve and you should get that appreciation and respect, hopefully, from them in return throughout the year. Please, please take the time to do that. Listen to this session again. You can contact me through engineeringcareercoach.com, contact us if you're interested in setting up a coaching session to help you get prepared for your annual review. IECD members, we have a lot of resources for you on this. But please don't take your annual performance review lightly. It may be the one chance you get to shine all year, especially if it's a bigger company because they're not going to see all the things that you've done. This is your time on stage, to really help yourself engineer your own success. With that, let's finish up the show with our career-changing tip.

Anthony's Career Changing Tip: Alright, now it's time for our career-changing tip. And this is a tip that I try to give out on every podcast. It's something of high value that you can take and implement into your career or life and get immediate changes. If you do this it will be a career and life-changing tip in many instances. And today I want to keep on going with the theme of today's show, which is your review, measuring yourself, reviewing progress. And what I want you to do is create some kind of dashboard for yourself, whether it's an excel document or word document or something that you can use to measure yourself every month. And on that document I want you to come up with a couple of measuring points. Now this should really reflect your goals and what some of your goals might be. But you need to come up with something quantitative, something you can measure. And I'll give you an example of myself. I'm in the process of rewriting my book, *Engineering Your Own Success* because we're putting out an updated and expanded edition in 2014. So one of my goals might be, finish this chapter or finish these chapters by a certain date or how many chapters have I done this month, something to measure myself by, measure my progress. Alright, if you're studying for the PE exam, again similar type example, and you're going through one of the reference manuals like the Lindeburg reference manual and it has just thirteen sections in it and you have thirteen weeks till the exam. Well then, every four weeks, which is every month, you should be finished with four sections. Something like that, anything you can do to measure. If you want to come a project manager in your company and you need to bring a hundred thousand dollars worth of new engineering projects, then maybe you can, each month you can see how much have I brought in. Alright, there's got to be something. And if you brainstorm you can come up with a lot of different ways you can measure yourself, but you have to do this in order to understand if you're on the right path to your goals. And if you're not, you need to figure out why not, what's going wrong here? How can I get refocused? And is this even the right goal for me if month after month I'm not moving closer to it?

Alright, so please, I know that this is extra work for you, but this may save you from doing work that's not taking you in the right direction. And that's what really matters in your career. I've talked to engineers that have worked a job for three years, five years, ten years and then realized it was the wrong job for them. Yes, I'm sure that they learned a lot of things in those ten years that they're going to use in the future, but ten years is ten years of your career. This is the prime time of your career. This is what I've been telling all of the *Institute for Engineering Career Development* members lately, I've been telling them that their goals have to be clear and they have to measure them because you want to spend the prime time of your engineering career in a role that's not working for you.

Anthony's Closing Remarks: So with that I want to thank you. I want to remind you all that you can visit the website at engineeringcareercoach.com/freegift enter in your name and email address and I will e-mail you a list of the top three resources that I utilized in my engineering career to become a partner in a firm at the age of twenty-seven. And I will tell you right now; these resources are free resources that you can start to utilize immediately. So please get the gift and if you're an IECD

member get your review session scheduled ASAP, a coaching session to prepare for your review scheduled ASAP. With that, again, happy holidays to you. I wish you a very happy new year and I hope that this year will be your best year ever and believe me I'm going to try to make sure that it is.

Thank you for listening to **The Engineering Career Coach Podcast with Anthony Fasano - transforming engineering career development one engineer at a time.**

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