Preparation

- **Review Job Description and Goals**
  - **Ensure Alignment**: Compare your job description (available on Workday) and any changes to your current responsibilities.
  - **Assess Goal Achievement**: Review the goals set during the last evaluation period and assess your progress and accomplishments.
    - What was accomplished?
    - What were the main outcomes?
    - What is left pending?
    - What is the plan to complete outstanding goals?

- **Gather Documentation**
  - **Performance Data**: Collect any quantitative data that reflects your performance (e.g., project completions).
  - **Feedback Records**: Compile any feedback received throughout the period, including emails, meeting notes, and informal comments.
  - **Project Reports**: Gather summaries of key projects you have worked on, highlighting your contributions and outcomes.
  - **Training and Development**: List any training sessions, workshops, or courses you have completed.

- **Self-Assessment**
  - **Strengths and Achievements**: Identify your key strengths and significant achievements.
  - **Areas for Improvement**: Assess areas where you could improve.
  - **Examples of Success**: Prepare specific examples that demonstrate your accomplishments and the impact of your work.
  - **Prepare Development Goals**: Identify skills you want to develop or improve, outline short and long-term career aspirations, and determine any training or resources needed to achieve your goals.

- **Plan Discussion Points**
  - **Performance Discussions**: Prepare points to discuss regarding your performance, including any clarifications needed.
  - **Stay On Point**: Be clear and concise in your notes; use bulleted lists to help pinpoint specific details.
  - **Feedback Request & Feedback Mechanism**: Think about specific areas where you would like to receive feedback and prepare to request input on feedback frequency and mechanisms.
  - **Performance Expectations**: Seek clarity on performance expectations and any changes in objectives.
  - **Specific Competency Discussion**: Prepare discussion points around the competencies that you are being evaluated on.
  - **Support Needs**: Identify any support you need from your manager to achieve your goals.
During the Meeting

- **Be Honest and Positive**
  - Maintain Focus: Be honest about your performance, but focus on your achievements and growth; maintain a positive attitude, even when discussing challenges or areas for improvement.

- **Stay Professional**
  - Maintain a Professional Demeanor: Engage in respectful and constructive dialogue with your supervisor.

- **Listen Actively**
  - Active Listening: Listen carefully to your supervisor’s feedback and ask for clarification if you do not understand any points made.

- **Discuss Your Points**
  - Strengths and Achievements: Do not be afraid to self-promote; highlight your key strengths and significant achievements; showcase new skills you have gained.
  - Areas of Development: Own your shortcomings; discuss areas where you seek improvement and how you plan to address them; share your development goals and seek your supervisor’s input.

- **Request Feedback**
  - Specific Feedback: Request specific feedback on your performance.
  - Future Expectations: Ask about future performance expectations and any changes in objectives.

- **Agree on Next Steps**
  - Action Items: Agree on any action items or goals for the next evaluation period.
  - Support: Identify any support you need from your supervisor or from WPI.

After the Meeting

- **Reflect on the Meeting**
  - Feedback Reflection: Reflect on the feedback received and how it can help you improve.
  - Meeting Outcomes: Begin tracking progress on your goals and objectives for your next review; consider the outcomes of the meeting and any agreements made.

- **Follow Up Action Items**
  - Immediate Actions: Start working on any immediate action items agreed upon during the meeting.
  - Long-term Goals: Develop a plan to achieve long-term goals discussed in the meeting.

- **Document the Meeting**
  - Notes: Document key points from the meeting, including feedback received, goals set, and action items.
  - Progress Tracking: Set up a system to track your progress on the agreed goals and action items.

- **Regular Check-ins**
  - Ongoing Feedback: Work with your manager to schedule regular check-ins to discuss progress and receive ongoing feedback.
  - Adjust Goals: Be open to adjusting your goals based on ongoing feedback and changes in priorities.