

# Article

## Performance Self Assessment and Communicating Upward

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Communicating “upward” in any organization can be difficult and stressful for associates who are passionate about their message. This scenario is even more difficult when the associate is trying to communicate his or her own value in conjunction with a growth or financial development plan.

There must be several baseline items considered prior to formulating any communication:

- The employee should be aware of his/her standing as it relates to “true” performance. It is imperative to be honest with yourself about how the work you do is being received and aligned with both personal and corporate objectives. Many times a gap between performance and objectives due to varying agendas creates a breakdown between employee and employer.
- The employee should elicit unscheduled feedback during the review cycle to ensure that his/her performance is staying the course. This also allows for a re-alignment of behavior and objectives as the corporate needs and/or culture may shift.
- The employee should perform a goal/value analysis of his/her standing within the organization. This is accomplished by aligning your beliefs, goals and values with the organization you work for. It is imperative that the employee be sure they are not forcing the continued relationship. This is one of the most important factors in the effort to ensure job satisfaction and ultimately one of the most overlooked. “Rutting” yourself is the most common mistake when evaluating self-worth and ultimate career goals. Change is hard, but sometimes it must be made.
- The employee should have a plan that illustrates their objectives, and most importantly structure this in a collaborative way to ensure it is not received as an “agenda.”

Once the employee completes the development of a baseline communication plan as noted above the following items should be crafted into the delivery format:

- The employee would be well served to draft a “brief” for the communication. This is not suggesting an agenda, yet something less formal to incorporate a value statement, self-assessment, recent accomplishments, past performance analysis and desired path forward. This can be used as a guide during the presentation and may or may not be handed out. Most importantly this exercise helps the employee to format an organized presentation.
- The employee should have considered a coaching/mentoring plan to support their desired development and present it in a humble yet confident way. This action will expose his/her willingness to learn and dedication to continued development.

The employee should consider what financial expectations are associated with the next step in their career and know how these expectations align with the organization’s structure. In small organizations requests for profit sharing and limited vesting are not uncommon but need to be considered carefully as the “owners” are far more protective than a “supervisor.” In these cases, present tenure, contribution and continued value-add as the long-term benefit. It would also be helpful to illustrate historical growth and commitment to support a more intimate relationship with the organization.



When the items above are complete all of the pieces are now ready to deliver a well-planned communication to your boss. Here are some delivery notes that will be helpful when making the presentation:

- Always open with a humble yet confident statement about why you have called this session. It is important that your confidence be very visible but not taken as over aggressive.
- When aligning your plan with that of the organization try to leverage real life examples of how the efforts you have contributed showed value above expectation. Additionally, you want to look forward at how this path will create continued value and growth.
- Never brush against the essence of “entitlement.” Remember that the organization does not “owe” you anything. This is very important especially when requesting further vesting and/or initial vesting in small organizations.
- Take the time to understand your boss and his/her expectations, goals and relationship with you. It is always helpful to prepare by role-playing with a “non” co-worker to establish a smooth delivery.
- Never share your plan or thoughts with anyone else in the organization.
- Plan a neutral location for the meeting, off site always works best to level the field and avoid distractions.
- Don’t represent a position of “negotiation.” You are not there to win/lose, you are there to identify value add points for your own position and the organization. The best-case scenario will play out naturally if you guide the process with integrity.

Once this process is complete, repeat the goal/value analysis. Unfortunately, one of the worst positions you can be in is one of weakness once the results are rendered. In other words, be willing to make changes against your personal career plans if you are not comfortable with the results of the effort.

Time is your most valuable commodity.