



Managing Yourself



How to Write an Effective Self-Assessment

Don't assume that your manager is aware of all you've accomplished. Here's how to artfully highlight what you've done this year.

by **Marlo Lyons**

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It's performance review season for many companies, which means it's time to reflect on the year and draft a self-assessment of your accomplishments. Writing an impactful self-assessment will set the tone for your manager's evaluation of your work, which can affect your compensation (e.g., merit increase, bonus, etc.).

When managers have numerous direct reports, they may not have visibility into or remember all your notable accomplishments. They also

don't have time to read a long retread of everything you achieved in the past year.

Here are five steps for drafting a self-assessment that covers your most impactful accomplishments and demonstrates self-awareness through a lens of improvement and development.

1. Focus on the entire year.

It's easiest to remember your accomplishments from the past few months, but you want to ensure your self-assessment covers your work from the entire year. If you didn't keep notes about your accomplishments throughout the year, review your calendar of meetings to remind yourself of projects you worked on and significant conversations you were a part of.

Take the time to list all your projects, assignments, and accomplishments in a document separate from the performance review. This will give you a holistic view of your achievements and will help you focus on the most important ones.

2. Consider company and functional goals.

Every company has goals, which are typically broken down to departmental or functional goals (and in some companies, further into individual goals). Determine which work comprises your general job duties versus which work is directly related to achieving the company and functional goals.

For example, maintaining a database of information may be a general job duty but isn't necessarily an accomplishment, no matter how hard it was to gather information from stakeholders. However, proposing and executing upgrades to the database or creating new workflows that

make using it more efficient could be related to a functional goal of increasing efficiency.

3. Look for alignment with the company values or culture.

How you did your job is just as important as what you accomplished. Once you've looked at your accomplishments in relation to company or functional goals, consider *how* you accomplished those goals in alignment with the company culture and values. Are certain accomplishments more closely aligned to those values than others?

Imagine one of your company's values is, "We strive to create better efficiency and effectiveness every day." So, *how* you created efficiency would demonstrate this value — for example, "Proactively communicated with numerous business units' leaders and influenced negatively impacted stakeholders to align on the new workflow, which resulted in no escalations."

4. Seek feedback from colleagues.

We're all biased toward our own successes and achievements. But your manager will be seeking feedback from others about your work, so get ahead of what they'll hear and incorporate it into your assessment.

For each accomplishment, reach out to cross-functional stakeholders and team members to understand their perception of it, making sure to ask specifically about any areas for development uncovered in last year's performance review.

For example, perhaps you finished a huge project and saved the company thousands of dollars, and one of your development areas from last year was proactive communication. When asking for feedback from several cross-functional stakeholders, inquire about the level of proactive communication they received from you. If all stakeholders

except for one felt sufficiently informed throughout the project, you can include in your self-assessment that most stakeholder feedback indicated your efforts to improve your communication were successful and that you'll work to continually improve communication with that one stakeholder.

5. Draft a concise accomplishment list.

Now you're ready to put together your actual self-assessment. Of your long list of accomplishments, pick no more than five of the most impactful ones to highlight. Each achievement should have fulfilled a company or functional goal, be aligned with the company's values and culture, and be informed by feedback from colleagues. Where applicable, include an improvement or success from a development area uncovered in last year's performance review.

If your company has values or cultural norms, consider using them as headers for each applicable accomplishment. Then use the STAR method — Situation, Task, Action, Result — to put it all together concisely, making sure to include learnings or development areas at the end.

In the following example, the company value is “We make data-driven decisions first before making decisions on gut feelings.”

Data-driven decision-making

Situation: I was the marketing DRI (directly responsible individual) for Product Alpha's launch in June.

Task: Create an innovative marketing campaign that's easy for sales to digest and sell and helps them hit their sales targets.

Action:

- Created the strategy for the product launch, including branding, messaging, launch roadmap, and KPIs for success.
- Empowered and led my team to own and deliver 28 different marketing assets.
- Used customer data combined with financial data from previous launches to determine messaging and align internal stakeholders with the overall marketing launch plan.
- Proactively communicated and aligned numerous business units (finance, marketing operations, sales, and brand strategy) toward consistent messaging.
- Trained the sales team on the messaging and marketing assets to use with each client persona.
- Launched campaign through numerous channels (email, web, sales) without any issues and received positive feedback from sales and customers.

Results:

- Product Alpha campaign was delivered on time and within budget and resulted in sales exceeding their sales targets within the first three months of launch.
- As we received feedback from the sales organization, I led the team to pivot and adjust the sales assets for continued adoption.

Learnings:

- I could have held weekly instead of bi-weekly meetings to ensure all stakeholders were aligned throughout the planning because if a stakeholder was out of office during the bi-weekly meeting, they felt uninformed.
- I had some trouble influencing the senior sales leadership to engage in the messaging meetings early in the planning, and we had churn when they wanted tweaks later in the process. I will be working on my influence without authority this coming year to ensure senior leadership is involved in the early brainstorming meetings.

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Finally, if the self-assessment asks for development areas, you should always include two. While we all want to believe we're doing a great job and it's hard to focus on our imperfections, remember that development areas are about becoming a better employee for an organization — they're not a reflection of your character and integrity. Consider continued improvement in a development area from the previous year if you haven't shown mastery in your accomplishment section. If you can't think of anything to improve on from your learnings, consider personal development areas that relate to the workplace, such as setting stronger boundaries or pivoting more quickly during times of change.

End your self-assessment on what your manager can do to support you in your development areas. This will open a dialogue about what opportunities they can provide to help you achieve even greater success in the coming year.

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