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In the room where it happens: A behind the scenes peek into the performance evaluation process

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ABSTRACT

Statistical programmers are eager to grow their career and advance. They work on more studies and submissions, derive complex datasets, perform advanced statistical analysis, generate beautiful data visualizations and dashboards ... and yet, they are skipped over for promotions.

They are left wondering as to how they are truly being evaluated. A behind the scenes look at the performance evaluation process will help statistical programmers understand how and who are evaluating their performance and even when these reviews are being performed. There are secret goals beyond my normal work? Define your ABOVE and BEYOND. It's not just my manager evaluating me? Map out your stakeholders. The year end performance review isn't performed at the end of the year? Start with a strong mid-year discussion. Statistical programmers must first understand the performance evaluation process, after which they can devise a strategy to optimize for their success.

INTRODUCTION

It is no longer enough for your work to speak for itself. You need to think more strategically about your advancement. A good starting point is to understand how those decisions are being made and by who. Your performance is being discussed and compared by managers behind closed doors. Often, these are called "calibration" meetings where managers advocate for their direct/indirect reports to get limited high performance ratings and even more limited promotions. Who are attending those meetings, and what discussions are happening behind closed doors? By getting a behind-the-scenes peek into these meetings, you can gain an edge in getting ahead and get the promotion that you deserve.

GOAL SETTING

The first and most obvious starting point for documenting and evaluating performance is the yearly goal setting process. Traditionally, goal setting has been about entering and meeting metrics. Generally this consists of completing some number of studies, datasets, and outputs

within a given time frame. This mindset prioritizes quantity and reduces the work to a factory style production focusing on throughput.

While that is still true, there is a growing need to go beyond the numbers. These new considerations are as follows:

- 1) Impact: Demonstrate how the work impacted the overall business
- 2) Visibility: Have your work recognized by leadership
- 3) Capabilities: Learn new skills and expand the scope of what your function can support
- 4) Collaboration: Be a true partner to other functions and move beyond a service provider

These new considerations must be met with updated goals or at the very least updated ways of presenting and showcasing your results. It is not just that you completed a lot of work on time, but that work had an impact on the business, you developed new skills, you collaborated with other functions, and that your work was visible to senior management.

There is also a distinction between performance in role versus above and beyond. Performance in role may be enough for new graduates and entry level roles, but it is rarely enough for mid to late career professionals. At those levels, high performance in role is expected. If high performance in role is not sufficient, then what is needed to show top performance? You need something Above and Beyond.

These activities need to go above and beyond what is expected at your level, and you need to excel in that above and beyond activity (or activities). These are often projects that are outside of your core job. They are stretch assignments and/or special projects. Another consideration is to use the Above and Beyond to coincide with your individual development plans. These can include the following:

- 1) Internal
 - a. Chair a working group
 - b. Expand internal capabilities, processes, tools
 - i. Develop standard tools
 - ii. Write a white paper
 - iii. Update SOPs
 - c. Organize departmental meetings
 - i. Offsite meetings
 - ii. Journal Club
 - iii. Invite External Speakers
 - iv. Invite Internal Speakers from other functions
 - d. Mentor an intern, junior colleague
 - e. Provide training to your group or to other groups
- 2) External
 - a. Join an industry working group
 - i. Lead a working group ...
 - ii. Do a hackathon ...

- iii. Conference session chair ...
- b. Present at a conference ... like PHUSE!!!

JOB LEVEL

Another frustrating reality is that you may be performing at a higher level with a higher set of responsibilities than someone with a higher job title. Traditionally, some may say that the work will speak for itself or some may trust that your manager will recognize the injustice. The reality, however, is that we need to advocate for ourselves.

The following framework can be used to document and calibrate your performance to various job levels:

- 1) Job descriptions/career ladders: You should obtain and review job descriptions at various levels. You can breakdown and should be able to clearly delineate the expectations and performance across various levels and roles. Having written many job descriptions and career ladders across multiple companies, well written job descriptions will have differentiate across several domains.
- 2) Map your performance/responsibilities to existing job descriptions: Based on the job descriptions, map out your performance or set of responsibilities to those job descriptions. One key caveat is that your assessment may be different from your manager's assessment. This discrepancy may lead to a productive discussion on what may be needed to be eligible for that promotion.
- 3) Communication plan: You can now use what you identified as an overall framework to communicate your scope of responsibilities and performance to your manager. Of course, careful and tactful communication is required to have a productive discussion.

EVALUATORS

Companies have limited budgets and cannot promote everyone or provide everyone with top performer bonuses. There are also checks in place so that an overly exuberant manager doesn't promote all of their direct reports. This takes place in meetings that are often called calibration meetings. These meetings are meant to level set what criteria are needed for promotions or top performer ratings, and these calibration meetings first happen at the function level then at a broader department level and all the way to the top to make sure that promotions and top performers are recognized fairly across the organization.

Across these calibration meetings, your manager is just the first person who evaluates your performance. Your performance is being evaluated by other stakeholders, managers of other functions, human resources, manager's manager, and ultimately senior management. Therefore, you will need to be prepared for all of these evaluators:

- 1) Stakeholders: Understand who your stakeholders are and make sure to seek and retain stakeholder feedback. Feedback from other functions will go a long way in convincing the management of other functions to support your promotion or rating.
- 2) Senior management: The ability to showcase your expertise and impact to those who will be in those meetings evaluating your promotion or rating will undoubtedly be helpful as they will be able to evaluate firsthand and provide their own support for you.

To gain support from stakeholders and senior management, you will need to do the following:

- 1) Feedback: You will need to establish strong relationships with stakeholders and collect feedback on a regular basis. Then communicate the collected feedback back to your manager on an on-going basis in addition to your annual evaluation.
- 2) Visibility: You will need to seek opportunities to showcase your expertise and impact. Support from the management of other functions carries quite a bit of weight in supporting your top performer/promotion evaluation. Additionally, if senior management can directly observe you in action, then they can also corroborate with their own feedback during the review process further strengthening your case.

EVALUATION TIMING

While the official evaluation may occur at midyear and at the end of year time, the real evaluation time frame tends to start much earlier. The end of year evaluation may be too late to demonstrate high performance. Those trending towards top performer rating and/or promotion may be identified during midyear evaluations, and the end of year evaluations are used to confirm that rating.

If the real evaluation is already happening at midyear, that means that you will need to be proactive in showcasing your performance not just at the end of the year but consistently throughout the year. Every meeting is an opportunity to showcase your achievements, provide stakeholder feedback, demonstrate new skills or knowledge and communicate how you helped your peers and department grow. Every presentation, especially those in front of senior management, is an opportunity to make a positive impression, so that they can nod and agree to your high performance when your top performance rating or promotion is being discussed.

CONCLUSION

In an environment of tight budgets and limited resources, identifying and recognizing top talent through top performer ratings and promotions is not an easy process. It is important to recognize the difficulties that managers face in making these decisions.

However, there are some proactive strategies that you can take to improve your chance of getting recognized and promoted. The table below summarizes concrete actions that you can take:

	1. Plan	2. Execute	3. Report
Goals (Above and Beyond)	Define Above and Beyond	Execute Above and Beyond	Report progress on Above and Beyond
Job Level	Review Job Descriptions	Seek out opportunities to gain experiences	Checklist of higher level requirements fulfilled
Stakeholders	Identify Stakeholders	Develop relationships and collect feedback	Summarize stakeholder feedback
Timing	Map out key meetings	Plan above evidence and leverage formal and informal meetings	Discuss key success messages accordingly

The table above provides you with some food for thought, but ultimately you will need to develop your own plan that best suits your personal style within the context of your organization.

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