

# In the Room Where it Happens: A Behind the Scenes Look at the Year-End Performance Review Process

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# Year-End Performance Review Process

## Agenda



Introduction  
You need a Strategy



Job Level  
Benchmarking performance



Timing  
End of year review ...  
isn't just at end of the year

01

03

05

02

04

06

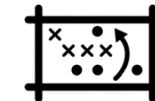
Goals  
Evaluation Criteria



Evaluators  
My manager ... right?

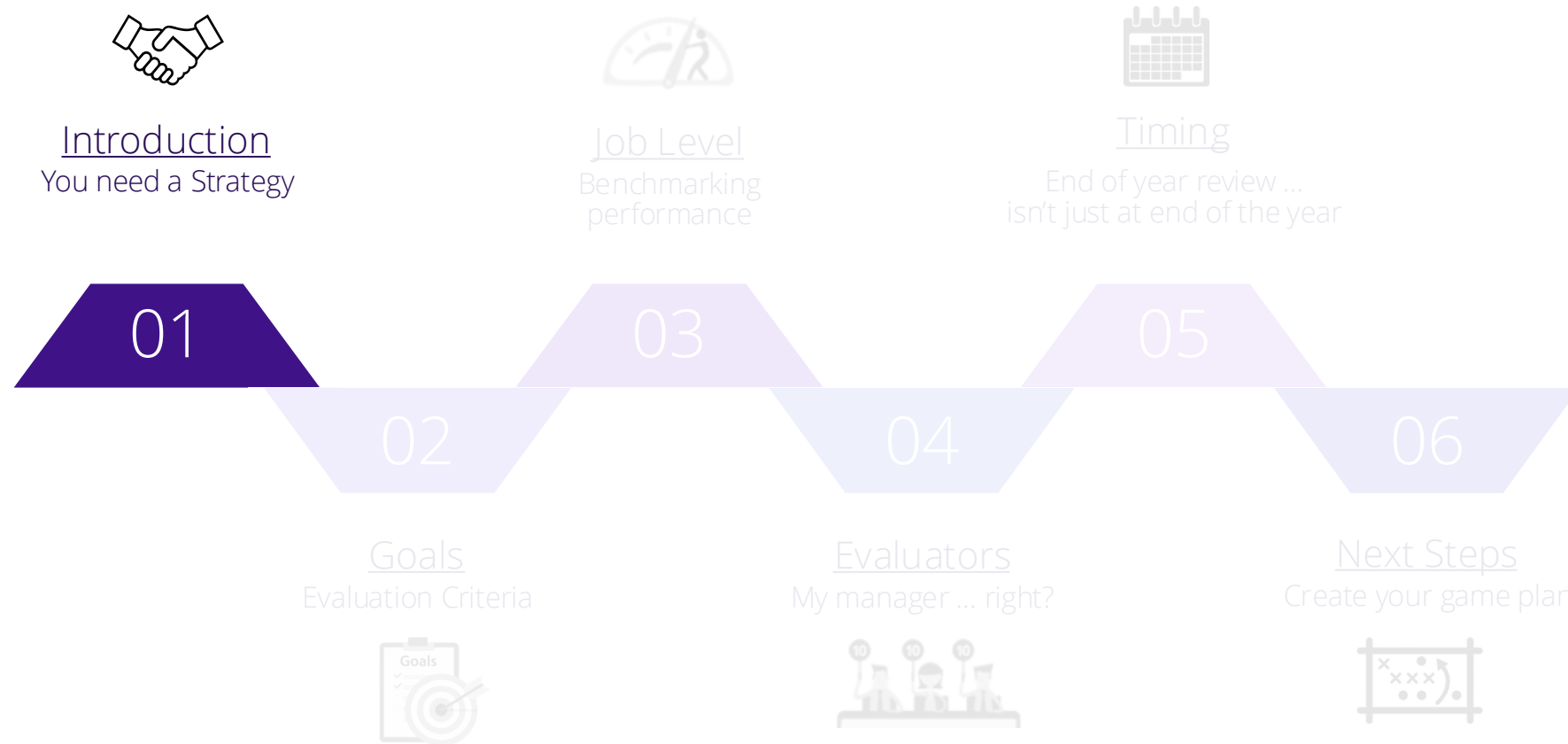


Next Steps  
Create your game plan



# Year-End Performance Review Process

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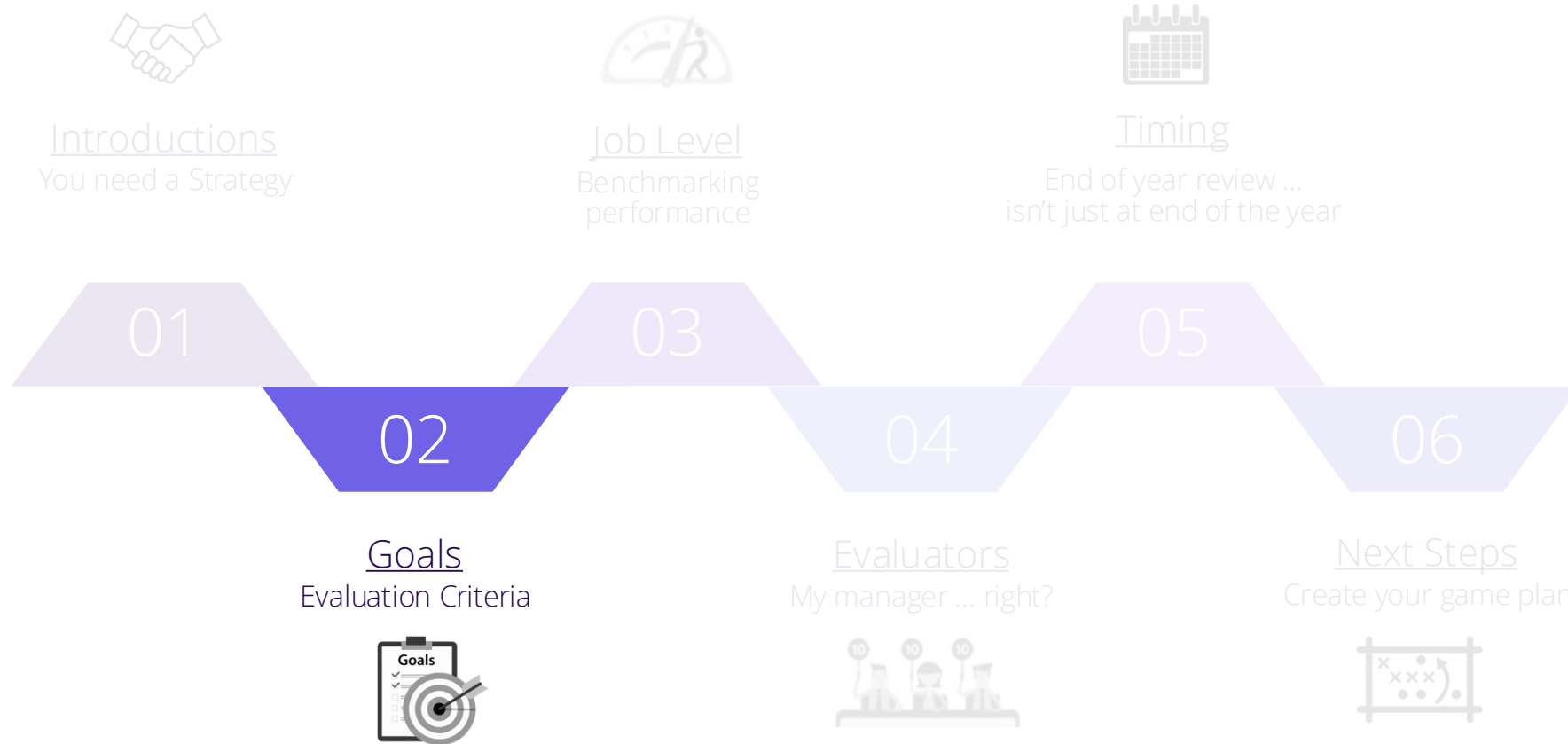


# Develop a Strategy



# Year-End Review Process

## Agenda



# Goals: Question

What am I being evaluated against?

**Make a mental note of your thoughts**

Goals entered into the system

Meeting timelines

Number of <fill in the blank> that I completed

**IMPACT** of the work

**VISIBILITY** gained through the work

**CAPABILITIES** developed

**COLLABORATION** that was needed

Any other goals???



**Performance in Role**

**VS**

**Above and Beyond**

# Performance in Role

**VS**

**Above and Beyond**

**Performance in Role**

**vs**

**Above and Beyond**

# Above and Beyond

**Outside of Core Job ...**

**Stretch Assignments ...**

**Special Projects ...**

**... and do an AWESOME job!!!**

# Above and Beyond

- **Internal**

- **Chair a working group**
- **Expand internal capabilities, processes, tools**
  - **Develop standard tools**
  - **Write a white paper**
  - **Update SOPs**
- **Organize departmental meetings:**
  - **Offsite meetings**
  - **Journal Club**
  - **Invite External Speakers**
  - **Invite Internal Speakers from other functions**
- **Mentor an intern, junior colleague**
- **Provide training to your group or to other groups**

- **External**

- **Join an industry working group**
  - **Lead a working group ...**
  - **Do a hackathon ...**
  - **Conference session chair ...**
- **Present at a conference ... like PHUSE!!!**

What is your **ABOVE** and **BEYOND**?

**Jot down your ABOVE and BEYOND ideas**

# Year-End Performance Review Process

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**What if I'm performing  
at a higher level?**

# Job Level: Old School

- **Your work will speak for itself**
- **Your manager will notice the hard work that you put in and the output that you produce**
- **You will get the promotion and rating that you deserve**



- **Understand your job description**
- **Understand job descriptions above your level**

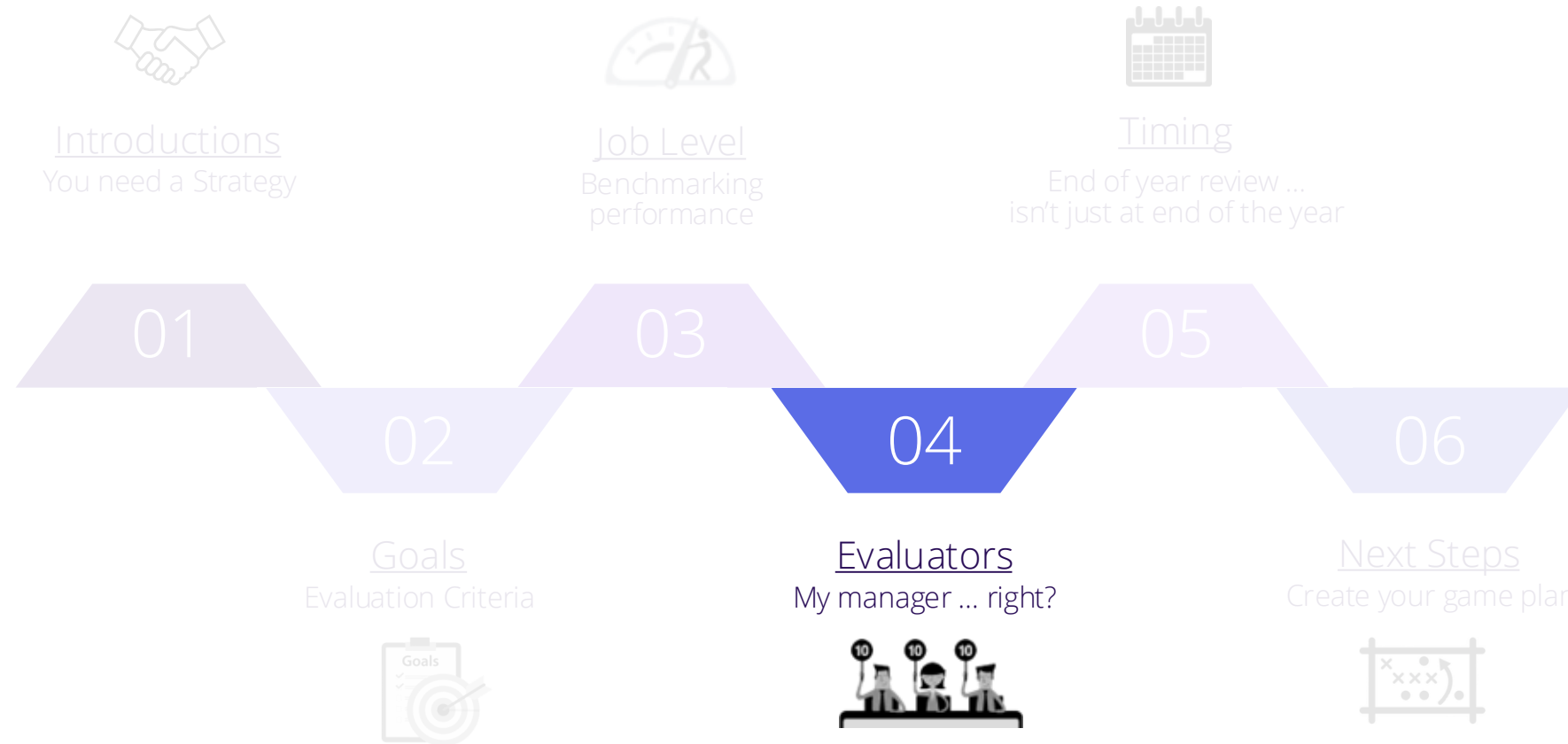
# Goals: Question

What if I'm performing  
at a higher level?

**Develop a systematic way of demonstrating and communicating your scope of responsibilities and performance at a higher level.**

# Year-End Performance Review Process

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**Who is evaluating my performance?**

**DUH ... My MANAGER**

# Evaluators: Think again

**Who else???**

- **Stakeholders**
- **Peers**
- **HR business partner**
- **Managers from other functions**
- **Your Manager's Manager**
- **Your Manager's Manager's Manager**

**Stakeholder Feedback**

**Visibility and Networking**

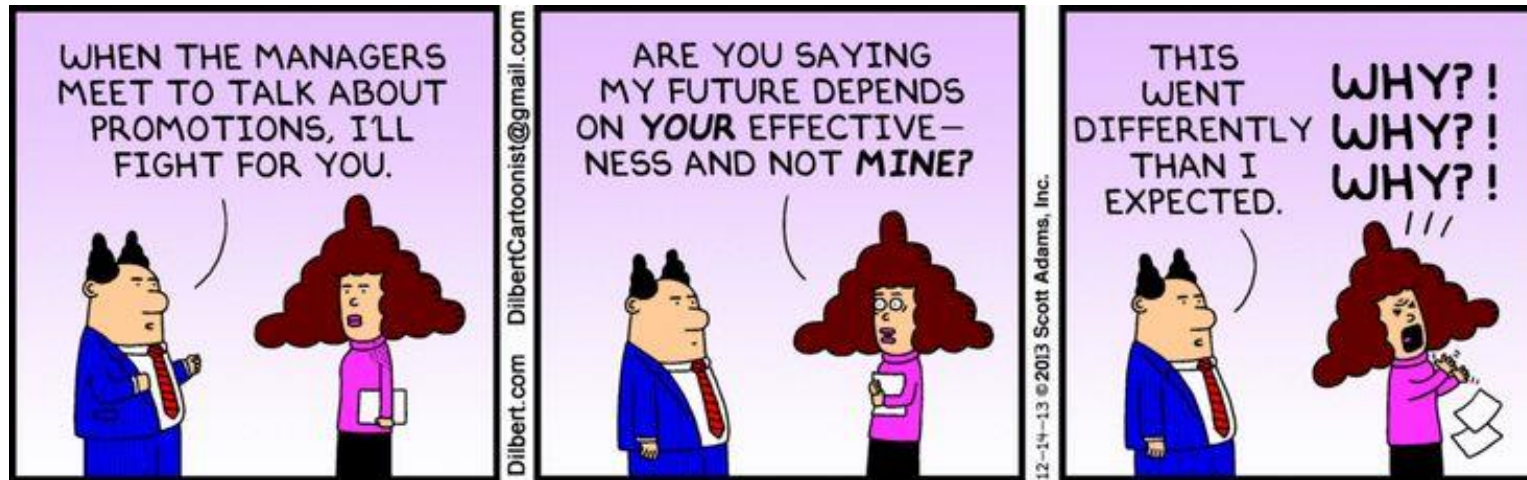
**Calibration Meetings**



- **Who are your stakeholders and what do they value**
- **Proactively talk with stakeholders who can provide feedback**
- **Collect feedback and recognition that you received so that you have a running list**



- **Develop a strong network within your organization**
- **Create opportunities for visibility**



- **Promotions and top performers are likely limited by allocated budget (~10-20%)**
- **Departments align on who receives promotion or top performer**
- **Manager presents the case and manager's peers and manager's manager have to agree**

# Goals: Question

Who is evaluating my performance?

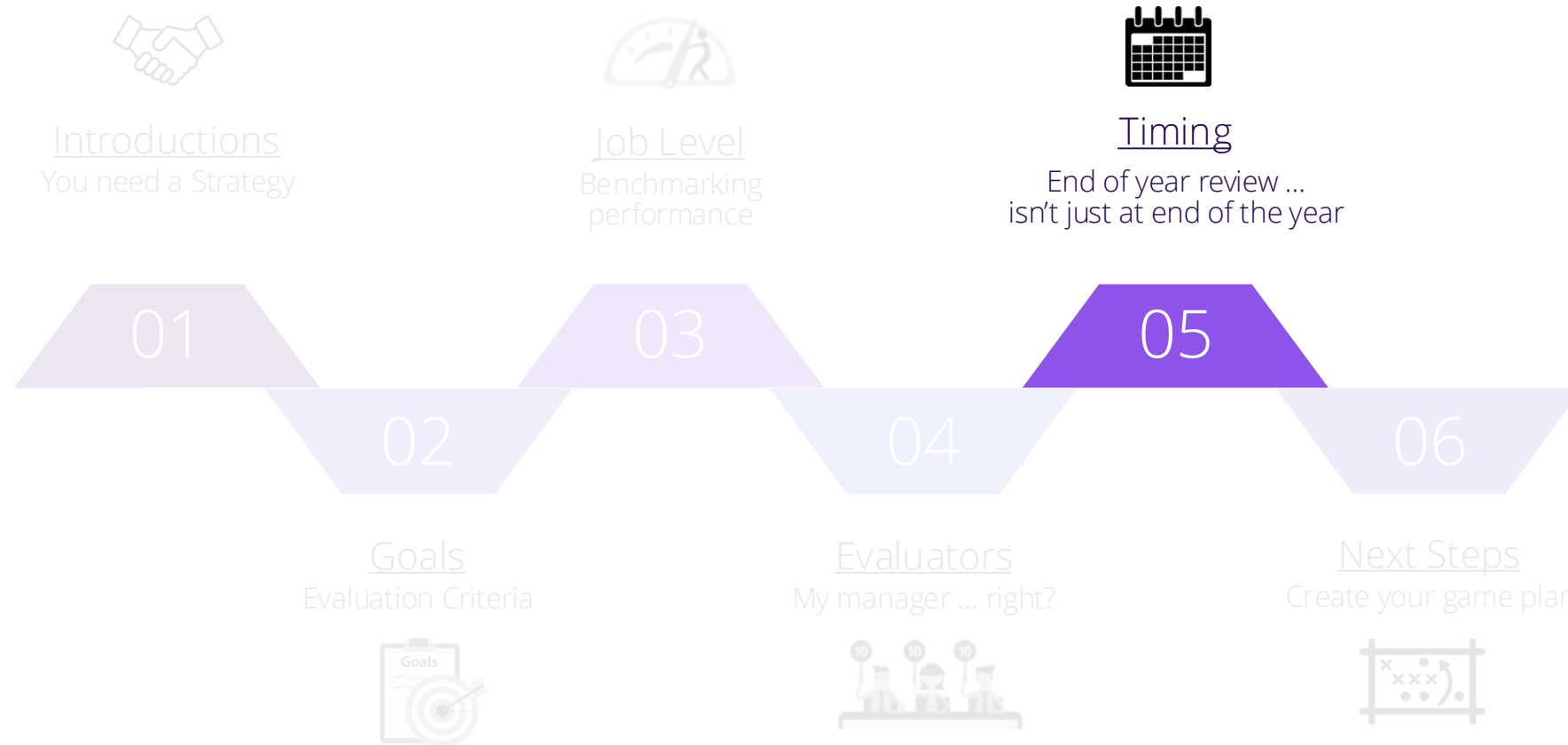
**List everyone who will be evaluating you (based on what you just learned).**

**Are you close to all these people?**

**How can you develop a closer relationship with them?**

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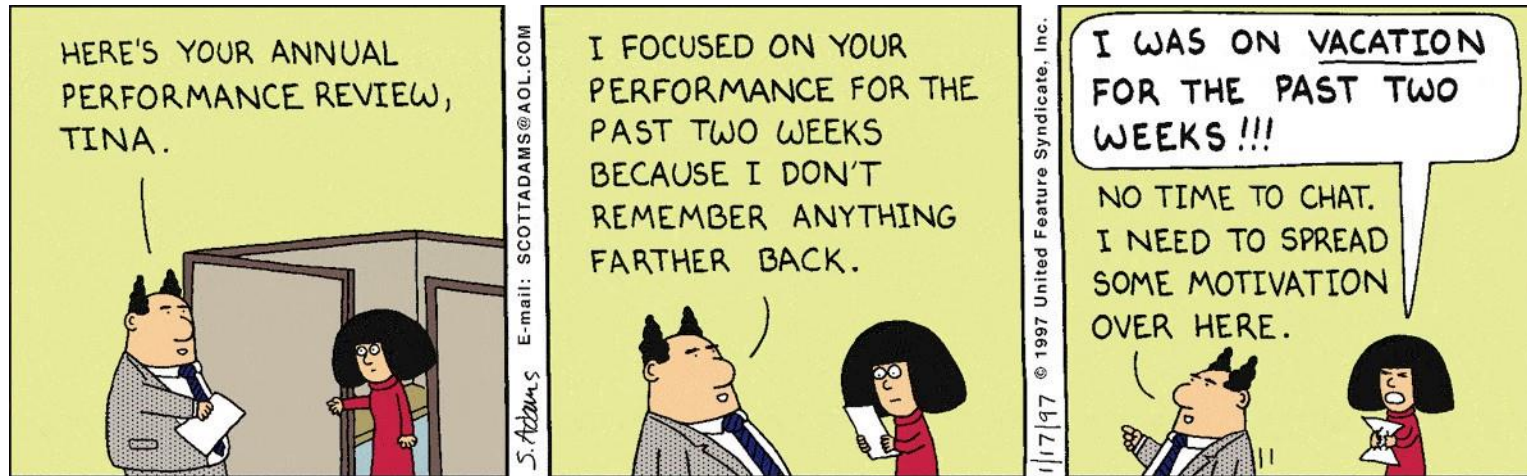


# Timing: Question

When should I talk to my manager  
about my performance?

# Timing: Old School

- Performance evaluations occur twice per year
- I will make sure to enter my comments into the system before the deadline
- I will then wait until my manager schedules a meeting



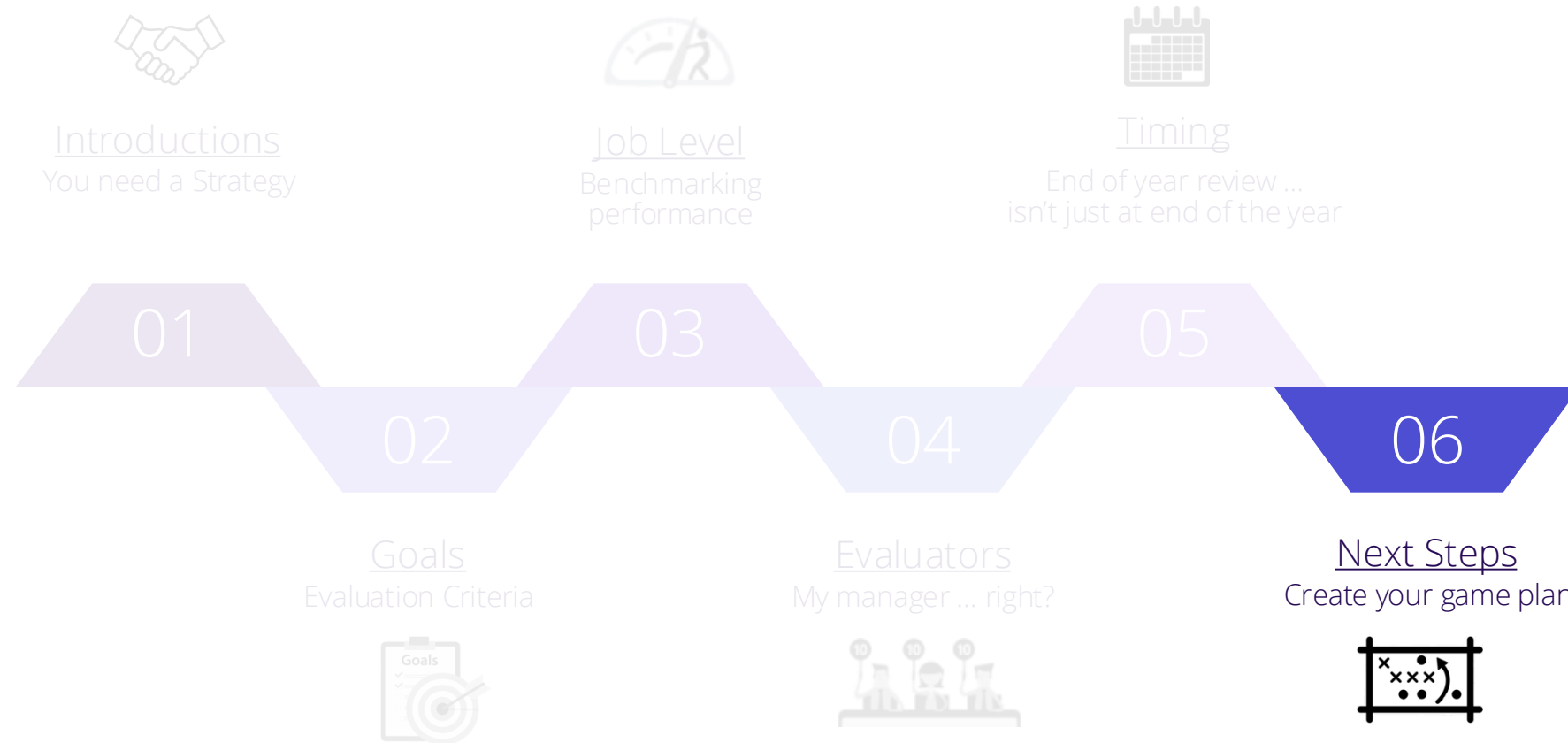
# Timing: New Considerations

- Earlier than you think
- Trending towards promotion or top performer may happen as early as mid-year reviews
- Year end performance review may be starting well before you meet with your manager about your year end performance

- Be proactive
- Every meeting is an opportunity to showcase your performance
- Make your manager aware of the positive feedback and recognition that you received

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# Game Plan

	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 Collect feedback	Summarize stakeholder feedback
Timing	Map out key meetings	Plan above evidence and leverage formal and informal meetings	Discuss key success messages accordingly

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