

Year-End Self-Assessment Checklist



Use this tool to reflect, advocate for yourself, and plan what's next for your career at year-end performance review time.

STEP 1: Make Space to Reflect

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| <input type="checkbox"/> Block intentional time to reflect | <input type="checkbox"/> View this as a growth exercise, not a task |
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STEP 2: Clarify How Success is Defined

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| <input type="checkbox"/> Review my job description/responsibilities
<input type="checkbox"/> Revisit goals or KPIs set for the year | <input type="checkbox"/> Review company values and performance standards |
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STEP 3: Capture Specific Outcomes & Evidence

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| <input type="checkbox"/> Document progress toward goals
<input type="checkbox"/> Note key metrics (e.g., sales, deadlines, deliverables, customer impact, etc.) | <input type="checkbox"/> Identify project success or milestones reached |
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STEP 4: Reflect on Growth & Learning

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| <input type="checkbox"/> Identify new skills, experiences, knowledge gained
<input type="checkbox"/> Reflect on problems solved | <input type="checkbox"/> Note moments where I stretched beyond my comfort zone to navigate challenges |
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STEP 5: Look Back at the Full Year

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| <input type="checkbox"/> Review calendar for major meetings, projects, milestones
<input type="checkbox"/> Revisit saved emails, recognition, feedback | <input type="checkbox"/> Reflect on coaching and feedback received
<input type="checkbox"/> Review 1-on-1 and meeting notes
<input type="checkbox"/> Recall training completed |
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STEP 6: Name Strengths & Development Areas

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| <input type="checkbox"/> Articulate what I did well and how I added value
<input type="checkbox"/> Identify where others relied on me | <input type="checkbox"/> Name growth areas with honesty
<input type="checkbox"/> Identify where support, clarity, or development would help |
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STEP 7: Prepare Emotionally

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| <input type="checkbox"/> Remember that feedback is about my work, not my worth | <input type="checkbox"/> Identify my assumptions and let them go |
| <input type="checkbox"/> Prepare to be curious, listen openly, and ask questions | <input type="checkbox"/> Ground myself with a growth mindset and intention to develop from feedback |

STEP 8: Look Forward

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| <input type="checkbox"/> Clarify what I want more of | <input type="checkbox"/> Identify skills or experiences to prioritize for my career future |
| <input type="checkbox"/> Clarify what I want less of | |

REFLECTION PROMPT

What did this year teach me, and how can I apply that learning in the next 90 days?

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