

Personal Evaluation Worksheet

I. Evaluate yourself

Assess yourself across the following areas: professional impact and development; personal fulfillment; physical and emotional health; interpersonal commitments to others; and contributions to your organization and industry.

Statement	Inexistent	Somewhat, but not enough	Adequate	More than enough
I complete my work as cost effectively as possible, while delivering high quality results, focusing on which efforts that produce the greatest ROI.				
Rather than taking on too many projects, I focus my time on the mission critical items and complete them to maximum effect.				
I continue to expand and deepen my learning by earning or maintaining professional credentials such as academic degrees, completing formal coursework, attending conferences, or other formal/informal learning opportunities.				
I take the time to examine past actions and decisions in order to learn from them for the future.				
I understand the values that are most important to me. I make sure that I live and work according to those values and that others in my life are aware of what my values are.				
I observe myself as I go about my workday while focusing on others' reactions at the same time and then take the time to reflect and make improvements.				
I am aware of my emotions and reactions, express my feelings in appropriate ways, think before I act, manage stress, get adequate rest and lead a healthy and active lifestyle.				
I choose to spend much of my time with people who have a positive impact on my mood or attitude.				
I take time to get to know and keep up with others, finding ways to relate to and communicate with them in order to build relationships and enhance results.				
I keep meetings to an appropriate length and end them on time, focusing on a pre-set agenda and making sure that attendees leave with a clear understanding of next steps.				
I generate ideas and find ways to incorporate their adoption, leading to measurable improvements/enhancements for my organization and my industry.				
I read often and widely, not only about my discipline and current events in my industry but also about subjects that can broaden my horizons.				

II. Conduct a personal S.W.O.T. (strengths, weaknesses, opportunities, and threats) analysis. *In conjunction with the information from Part I, complete the following steps:*

Step 1: Determine what attributes are necessary to optimize your performance.

Step 2: Which attributes represent current strengths you have control over? Weaknesses?

Step 3: Which attributes provide opportunities the organization, industry, or outside environment presents? Threats?

Step 4: Align the internal against the external. Where can you be proactive? What should you invest your time and energy in developing? What should you take care of correctively? What should you stop doing or avoid?

SAMPLE PERFORMANCE ATTRIBUTES

Attribute	Evaluation: Strength? Weakness? Opportunity? Threat? (or N/A)
Attraction and maintenance of high-quality top management	
Employee and management development	
Use of new quantitative tools and techniques in decision-making	
Use of judgment, creativity, and imagination in decision-making	
Use of computers in problem solving and planning, as well as information handling and financial control	
Perceives new needs and opportunities for products/services	
Motivates others to achieve goals	
Raises long-term capital at low cost	
Raises short-term capital	
Maximizes stockholder (or funder) investment and returns	
Takes risks with commensurate returns	
Applies return on investment criteria to R&D investments	
Accumulates knowledge about the marketplace	
Maximizes appropriate customer base	
Establishes and maintains an efficient product distribution system	
Obtains advantageous business contracts	
Incorporates imaginative advertising and sales promotion campaigns	
Uses pricing strategies effectively	
Improves current products/services	
Develops more efficient and effective product line selection	
Develops new products/services to replace old ones	
Develops new products/services in new markets	
Increases market share	
Attracts highly qualified employees	
Establishes good relationships with employees	
Uses the skills of employees	
Motivates more employees to remain abreast of industry developments	
Levels peaks and valleys of employment requirements	
Stimulates creativity in employees	
Optimizes employee turnover	
Other:	

III. Your 2022 Personal Plan

CATEGORY	RELATED ORGANIZATIONAL GOAL(S)	YOUR S.M.A.R.T. OBJECTIVE(S)	TRACKABLE KPI(S)	TARGETED RESULTS
Professional impact				
Professional development				
Personal fulfillment				
Physical/emotional health				
Interpersonal commitments to others				
Contributions to your organization & industry				