



THE ULTIMATE  
GUIDE TO

# Acing Your Performance Review

THE FOREM

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# Introduction

## Welcome!

If you're here, then it's a safe bet that your performance review is somewhere on the horizon.

Did that sentence just give you anxiety, or make you say UGH, I HATE THESE?

Have you had a tendency to procrastinate on your self-evaluation in the past?

Have you ever felt like you didn't get the chance to say what you really wanted in your review, or walked out with the sense that your manager didn't understand your great work?

### **We get it.**

It's normal to feel awkward or anxious about a process we don't fully understand, especially one that maybe we don't think we have a lot of control over.

Most companies aren't transparent about how performance reviews work and how promotions are decided and awarded. There's no one-pager posted on the bulletin board that tells you exactly who sits in calibration and what benchmarks you need to hit for the next step up.

BUT, the information isn't hidden. It's not taboo to ask and educate yourself. It's just not something that occurs to most of us until we've had years of experience under our belts and have already been awarded a leadership role.

### **The Forem is going to change that for you right now.**

In this *Ultimate Guide to Acing Your Performance Review*, you'll learn some key pillars that are absolutely essential to your career, not just so you can nail your upcoming performance review, but so you can fully understand how to navigate your organization and set yourself up to achieve your goals. (Now.... and in the future!)

### **Let's start with The Four Performance Review Disciplines:**

- Normalize it
- Track your work
- Career discussions
- Know how the system works

# The Four Performance Review Disciplines

## Normalize it

One big thing that feels awkward in a performance review is FEEDBACK. But here's the secret: it only feels awkward because (for most of us) it only happens once or twice a year.

If you want that promotion or raise, the first thing you need to do is start asking for feedback consistently.

Why?

Because your review process isn't where your assessment starts: it's where it ENDS. So you need to be talking about your work and progress long before you step into your review.

Feedback is the #1 mechanism you can use to gather data about your performance and the things that are (or are not) working for you. It allows you to make adjustments over time and control how your performance is perceived.

Normalize feedback so that when reviews roll around, it doesn't feel awkward to say to your manager: "I want XYZ. Am I on track to get there? And if not, what do I need to do?"

At The Forem, we've discovered that creating a framework can help with this process.

We recommend a **2X2 feedback model**, which you can tack on in 5 minutes at the end of a weekly meeting with your manager. It works like this:

You go first. Say one thing you thought you did really well that week, and then say one thing you want to improve. Your manager goes next. She says one thing you did really well this week, and then one thing she wants you to work on.

That's it. 5 minutes at the end of a weekly 1:1 with your manager.

Something so simple can have a huge payoff for your entire career, because you'll always be informed about how your work is perceived and what you can do to improve.

Just remember that it's up to you to establish this discipline with your manager. (She won't remember to do it herself: she has too much on her plate). Be persistent but mindful of your manager's time and keep it simple.

# The Four Performance Review Disciplines

## Normalize it

### Your Challenge:

Right now, come up with your action plan.

How are you going to broach the subject of feedback with your manager? Are you going to mention it in your next 1:1? Do you need to get a 1:1 on the calendar?

(Try saying to her: "Feedback is really important to me, because I'm dedicated to improving my performance here. Can we take 5 minutes at the end of each meeting to talk about this?")

Suggest our 2x2 feedback model, or ask your manager how she prefers to give feedback.

Take 2 minutes to write down your action plan now.

### My action plan:

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# The Four Performance Review Disciplines

## Track Your Work

At The Forem, there is a *key habit* we teach in our bootcamps that we believe is more important than anything else:

### Keep track of your accomplishments.

You should document these weekly and share them with your manager on a quarterly basis. Why?

Because honestly, no one remembers your work. Think about it: what did you accomplish last month? Six months ago? At the beginning of the year? Chances are, you'd need to go back through your email and calendar to compile some of your best projects and remember exactly what you did.

And if YOU need to do that about your own work... there's no chance your manager will remember all your contributions.

It's nothing personal! It just happens because we're all busy.

Tracking your accomplishments will help you build a comprehensive record that shows your impact over time. Sharing this with your manager regularly will:

- Keep your work top of mind
- Help you nail your performance review at the end of the year
- Give your manager talking points to reference that are clearly aligned with your value

Don't send your manager a novel (she won't read it). We recommend bullet points that specifically highlight your business impact.

Your accomplishments should clearly and succinctly explain how you helped **make money, save money, or contributed to a company value.**

### Check out these examples:

“

In Q1, I developed and scaled a new pitch which was adopted by three teams and will generate an incremental \$3M in sales across all teams.

“

Created a new workflow when onboarding new vendors, so we get paid faster, with reduced number of hours.

“

Identified significant overlap in 4 cross-functional sales teams. Created and led a task force to unilaterally develop agreed upon ROE (hyperlink), becoming the blueprint for all pod operations.

# The Four Performance Review Disciplines

## Track Your Work

More examples:

“

Increased customer satisfaction for 200 customers by responding to support emails 20% faster

“

Taught a new pitch deck via a lunch-and-learn with X lateral team. We project \$10M in incremental sales based on 15% adoption of new methodology.

Don't be surprised if your manager ends up using your exact words when she pitches you to her bosses or advocates for your promotion or raise. These are the insights she needs, and she'll likely thank you for staying on top of the ball and putting these together.

## Pro Tips:

- 1: When possible, include numbers and dollar amounts in your accomplishments.
- 2: Add testimonials where relevant. For example, did you take the lead on a project and heard great feedback from colleagues, a department head, client or other manager? Ask this person for a testimonial and write it down in your accomplishments.\*

\*Think of this as simply “marketing” yourself. There’s a reason why you see testimonials all over Instagram ads! They will bolster your impact and help you stand out with your manager.

## Your Challenge:

Take 5 minutes right now to jot down your major accomplishments over the last few weeks. This can be messy; the point is to just get it on paper.

**My Recent Accomplishments:**

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# The Four Performance Review Disciplines

## Track Your Work

Next, ensure each accomplishment can be connected to business impact.

- How did your accomplishment contribute to a company goal or revenue?
- Did you increase productivity, streamline a process, or pitch a new initiative?
- Did you contribute to team culture, which impacts productivity and retention?

If so, great! Figure out some numbers (even if they're rough assumptions) and add these.

Rewrite your notes and organize your accomplishments into clear, succinct bullet points connected to your impact.

### Headlines and Impact:

1.

2.

3.

4.

Now, send these polished accomplishments to your manager. Seriously, drop them in an email saying, "this is the work I'm most proud of this month, for your files" — and make sure you discuss them in your next 1:1.

☐ I sent my accomplishments to my manager and I have a plan to discuss them.



# The Four Performance Review Disciplines

## Career Discussions

Like asking for feedback and sharing your accomplishments, career discussions should be normalized.

Think about it: you can't afford to talk about your future only once per year!

We recommend spending one hour per quarter with your manager to just talk about your career. No agenda. Just an honest, frank conversation about your goals and future.

The catch? It falls on **you** to establish this discipline and put this on the calendar well in advance.\*

*\*By the way, your manager will probably thank you for this. She has so much on her plate, she doesn't have time to keep track of every team member's ambitions. When you do some of the leg work for her, she will know how best to use your talents and can put you up for more projects aligned with your goals. If she can't commit to an hour, scale it back to 20 or 30 minutes. Just make sure you have the conversation.*

You might be thinking: "What if I have no idea what my career goals are?"

That happens! The key is to keep having career discussions, even if you're not clear on your own goals.

Instead of walking into this meeting feeling pressured to say something grand, just focus on what you like about your current role. Discuss that with your manager. Tell her about your passions, why you like certain work, and why you dislike other work.

This can help both of you get clarity on the types of projects and roles that will maximize your talent. (It's every manager's dream to understand this: it makes their job a lot easier).

P. S. *If you're reading this and thinking: "My manager and I have an adversarial relationship," that's okay. You're not alone. You should STILL have a career discussion with her. BUT, you should also be taking other steps to protect yourself. That's a big topic to cover here, so check out our bootcamps and resources at The Forem if you're looking for more advice.*

# The Four Performance Review Disciplines

## Career Discussions

### Your Challenge:

Right now, put a career discussion in your manager's calendar.  
(Bonus points if you schedule ahead and lay these out for the next four quarters.)

☐ I've scheduled my career discussion

Now, take a few minutes to write down work you like and work you dislike. What kinds of projects excite you? What creates energy for you and makes you excited to walk into the office every day?

Share this with your manager in your discussion, so she has the insights that will allow her to give you more projects aligned with your passions.

These notes will help you.

### My Strengths and Passions:

1.

2.

3.

4.

# The Four Performance Review Disciplines

## Know How the System Works

When you understand how your organization functions, you can quickly develop new strategies to increase your visibility to the right people.

\*Note that every department and organization has its own nuances, so it's essential to research and understand yours.

## What is Talent Planning?

As a company grows, demands on the employees change over time. To ensure employee skills align with changing demand, companies need to plan in advance for the talent (human capital) that will get them where they need to go.

Often, organizations review top talent within each team and department. During this process, managers and department heads outline which employees are considered top talent at each level, and who has the most potential to grow in their role.

Employees perceived as top talent are the ones who are promoted, compensated more, given strategic projects, and also given incremental resources like leadership development workshops and classes... all of which gives them an additional competitive edge.

Top talent isn't a fixed state. Top talent changes each year based on personnel, changing organizational demands, and career progression.

For instance, a top individual contributor might have been considered top talent in his original role, but when that same employee moved to a management position where he struggled, his perceived potential likely decreased.

Additionally, a heads-down employee who does great work might be considered "middle of the road" in terms of potential. If that same employee suddenly shows strategic initiative and raises her visibility, she can easily be moved to a top talent position.

## Doesn't Sound Like Your Company?

Not working for a company that has a talent review process in place? (Or maybe even a performance review process in place?)

This is common in mid-sized or smaller companies, and that's okay. It's still important to do the research and find out how your system works.

# The Four Performance Review Disciplines

## Know How the System Works

For example, there are definitely people in your organization who have a say in whether or not you get a raise or promotion (like a founder or VC).

Your task is to identify those people and the process. Who does your manager have to convince to get you that Big Ask? Who has the ear of the CFO or CEO and can advocate for you?

Identify these people so you can plan your next steps. We'll talk later about how to build an authentic relationship with them and raise your visibility, so you can feel confident going into your performance review.

### Your Challenge:

Connect one-on-one with a mentor, manager, or point of contact in human resources and have her review your department's process, because talent planning looks different from company to company.

#### The big questions are:

1. How exactly does talent planning work in your company and your department?
2. Who sits in on each talent review?
3. When are talent reviews scheduled (quarterly, annually, etc)?

Remember, the more you know about how your company and department functions, the better you can navigate it.

Once you know WHO is in the room, it falls on you to make a plan to turn these career stakeholders into your career advocates. At The Forem, we call this "Influencer Mapping." We take a full two weeks to cover it in our bootcamps! If this sounds interesting to you, you can [find out more here](#).

# Your Annual Review Timeline

## Six Months Out

- ☐ If you don't have them yet, establish weekly 1:1s in your manager's calendar. You'll use these 15–30 minutes to discuss updates for ongoing projects and to ask for feedback.
- ☐ When you receive feedback, make a plan for implementing improvements.
- ☐ Have a career discussion with your manager six months before your performance review. Talk about your strengths and passions and the work you love.
- ☐ Start scribbling down your accomplishments. Polish them every 2 weeks and look for #s and \$ amounts you can use for headlines. Make sure you write down any accomplishments that reflect improvement based on your manager's feedback.
- ☐ If someone says something great about your work, get a testimonial and save it with your accomplishments. Use these key insights to provide context for your great work.

## Three Months Out

- ☐ First things first: send your polished accomplishments to your manager before your next 1:1. Make sure you discuss them during your 1:1 as well.
- ☐ Feedback check in: how have you improved recently? Where are you still struggling? Discuss this with your manager.
- ☐ Career goals check in: has anything changed? Have you identified something new about your strengths and passions? Have you achieved a goal or received clarity about your future? Get another career discussion on the calendar with your manager. If you have a Big Ask in mind for your review, now is the time to pick her brain. Are you on track to get that Big Ask?
- ☐ Continue tracking your accomplishments and polishing them on a bi-weekly basis

## One Month Out

- ☐ This may vary from company to company, but by now you likely have review-related action items on your desk. These can include: writing your self assessment and asking peers to review you.
- ☐ Make a list of strategic peers you'd like to review your work. Get these requests in now, so they have plenty of time to respond.
- ☐ Mention your career goals in your next manager 1:1. Float these to the top of her mind and (as usual) ask for her feedback. If there's anything you need to do to get that Big Ask, make that your top priority this month

# Your Annual Review Timeline

## One Week Out

- ☐ Finish & submit your self-assessment
- ☐ Kindly follow up with any peer reviewers who have not submitted their reviews yet.
- ☐ Review our sections on “Questions to prepare for” and “Questions to ask.”  
(Keep scrolling down this doc!)
- ☐ Breathe. You’ve got this!

## One Week After

- ☐ Send a follow up email to your manager. It should be succinct and contain the following:
  1. Thank her for your review experience.
  2. Briefly recap the topics that were covered in your review.
  3. Bullet point your intentions. What are the major things you want to accomplish over the next three months?
  4. Make sure your next regular 1:1 is on the schedule.

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## Performance Reviews and COVID-19

Real talk: nothing is normal about performance reviews this year (or even for the next two years).

Many of you may have received notice that your company has enacted a hiring freeze, raise freeze, or promotions freeze.

We’re all navigating uncharted territory. Through this uncertainty, The Forem has been able to rely on the decades of experience across our team to bring you the most actionable, impactful advice that will protect and help your career during this time.

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## Number one: visibility should be your first priority.

Even before COVID hit and we all went remote, **your visibility** was the #1 protector (and accelerator) for your career.

You can’t get credit for your work if no one knows about it.

You can’t expect managers and executives to fight for your role or promotion if they don’t feel 100% clear on your value (or know how to articulate it to **their** higher-ups).

# Your Annual Review Timeline

Now, with everyone OOO and with potential budget cuts on the horizon, ***your visibility matters more than ever.***

Luckily, we've already given you the best strategies.

Scroll back up and re-read The Four Performance Review Disciplines. These evergreen, critical career habits ensure your work is visible and value known (even while you're at home, in pajamas, behind your computer screen, with your dog on your feet).

Give your manager clear talking points by sharing your accomplishments on a regular basis and checking in with weekly 1:1s.

Make sure she knows what projects you're tackling, how you raised revenue or streamlined a process, and where you want to go next with your company.

During this period of remote work, we're also revising our usual recommendation. Instead of sharing your accomplishments with your manager on a quarterly basis, **send these to her MONTHLY (and make sure you discuss these monthly as well).**\*

*\*Just make sure you've taken the time to polish your accomplishments and put them in a digestible format. It won't help to overwhelm your manager with pages and pages of your work.*

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## Number two: your network is your most important asset.

Did you know that 85% of your career opportunities come from your network? 85%!

And right now, it's more important than ever to invest in the people around you.

Who in your company has something great to say about your work and is willing to vouch for you? Get a testimonial from them now and add this to the list of accomplishments you send your manager.\*

*\*This is especially important if you don't have a strong relationship with your manager (or if your manager relationship is adversarial). Who else in the company holds influence? Build relationships with other managers, respected colleagues, and/or department heads. Find the people who will advocate for you even if your manager won't.*

Next, who is in your "loose" network? Check in with them. Send a quick message on LinkedIn, drop an email, or share an article you think they'd like. Keep yourself top of mind and find out if there's anything you can do to help your network during this time.

Maybe you have guidance or expertise you can offer. Maybe someone is looking for a role within your company. Or maybe someone has a job opening that perfectly aligns with your strengths and passions. You won't know unless you initiate.

Just remember that networking is a two way street, and it's always a good idea to invest in others before asking them to invest in you.

# What if my company doesn't have reviews?....

## What if my company doesn't have reviews?

Great question!

Though most large organizations have a standard review process, there are many mid-sized and smaller companies that might not have this structure in place.

Again, we're going to direct you to the The Four Performance Review Disciplines. Why?

**Because normalizing feedback and career discussions will help you:**

1. Consistently position yourself for a Big Ask and more leadership opportunities
2. Raise your visibility with skip levels and department heads
3. Get a "yes" response when you ask your manager for a formal review

(That's a lot of reasons. We weren't kidding when we said The Four Performance Review Disciplines are essential to your career success.)

**Should you ask for a review if your company doesn't offer one?**

Yes. Absolutely.

Asking for a review gives your manager the opportunity to focus strategically on your work and think thoughtfully about your performance and potential. It also gives both of you the opportunity to align on YOUR career goals.

And, asking helps you stand out from the crowd (especially if your company doesn't have a review process in place). It proves that you are invested in your performance and growth. This makes you a better asset to your company and means you'll be top of mind when new opportunities arise.

The trick is to not make this review feel like more work for your manager. The Four Performance Review Disciplines can protect and help you here.

If you and your manager are already used to meeting 1:1 to discuss your accomplishments and talk about your career, then this "official review" won't feel like extra work. Just put it in your regular 1:1 time slot. The only difference is that each of you will come prepared with an assessment and will be ready to talk about it... and you'll ask your manager to review your work with her *manager*, too.



# PRO TIP: Strategize your peer reviews...

## PRO TIP: Strategize your peer reviews

Many large companies require peer reviews as part of the annual review process. If this is your company, you should be asking: "Who should write my peer reviews?"

This is an area that's easy to overlook, but if done correctly, it can have an enormous impact.

Avoid just asking your friends and/or the colleagues you work with closely every day. Why?

Because managers like to see that you can think cross-functionally and go beyond your team. This exemplifies your leadership ability (and increases your potential for promotion).

### TIPS FOR SELECTING YOUR PEER REVIEWERS:

- **Think cross-functionally:** ask from a variety of teams.
- **Think senior:** more senior = more influential.
- **Put in the time.** When you make your request, send a note asking 1) if they'll provide feedback, and 2) specifically what you want feedback on. For example, if you ask a manager you worked with only once or twice, make sure you specify that you'd like her review of your work on X project in Y role. This makes it easier for the person to say yes and helps you stand out from the crowd.
- **Don't wait until the last minute.** Make sure you give people plenty of space and time to respond.

### Your Challenge:

Take 3 minutes to quickly write down a list of people you'd like to ask for peer reviews.

### PEOPLE WHO WOULD MAKE GOOD PEER REVIEWERS:

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# What to ask your manager in a performance review....

## What to ask your manager in a performance review

Our Mentors at The Forem weighed in on the best questions to ask your manager in a performance review. Here's what they have to say:



**Laurie Battaglia,**  
CEO Aligned at Work®

*The following questions can really get the conversation going about reputation, reality, and what to expect in the following year(s). These are incredibly important insights for your career.*

1. How am I perceived by your peers and my peers as a performer in my current role?
2. What is senior management's perception of me? (Do they know who I am? Do they have a perception of me?) And if they don't know me, how can I get into a more visible role?
3. What are my derailers that are going to keep me from advancing?
4. What are the strengths I should leverage as I navigate my career?

# What to ask your manager in a performance review....



**Tiffany Flomo**

*Asking the right questions in your performance review is critical to your continued development and success. My two go-tos are:*

1. What does success look like moving forward? What impact do you need to see from me to feel confident that I'm exceeding your expectations?
2. What, if any, are the shifting priorities of the team / organization that I should be aware of? And what can I do to best contribute to these priorities?

Why these two? Well, for the first question, you want to be clear on what's expected of you, what does it look like to go above and beyond and how you'll be measured.

You should have an opinion or perspective on this – and it's important to share with your manager – but you want to ensure you're aligned with your manager's expectation. When you have clear goals and success indicators, you'll be able to better focus on the work that matters and track your progress along the way.

As for the second question, one thing everyone knows and can agree on regardless of where you work is that **change is constant**.

Business needs are constantly shifting and there will be times when you'll have to shift along with them. If you want to continue growing in your career, it's important to know what those shifts are and how you can position yourself to be someone who continues to add value. This may require you developing a new skill set, taking on additional responsibilities or a new role.

It's important to know what the (new) priorities are so you can be proactive and set yourself up to succeed through these changes.

# How do I ask for a raise?

First, you need to understand how raises at your company work.

Raises are never decided by one person. Though it's key to have your manager advocate for you, that's not enough. Your manager's peers also need to agree that you deserve a raise. That means they need to be aware of your great work, track record, and potential — and be willing to stick up for you to their bosses.

## **So #1: make sure you're practicing The Four Performance Review Disciplines.**

(See the pattern here?) These disciplines will help you continue to raise your visibility and ensure your work doesn't get "lost."

## **#2: Network up.**

You don't need to be best buddies with your skip level and your manager's peers, but they should be familiar with you, your work, your impact and your goals.

First, identify the people who will have a say in approving your raise or promotion. Who sits in calibration? Who holds the most influence?

Then, come up with a plan to turn these career influencers into your career advocates.

The key to gaining visibility with your career influencers is to provide them with relevant and important information. What does this person care about? What are her goals and challenges? AND, what can you offer her that will help?

For example, is your influencer the CRO? Then she cares about revenue. Is your influencer the head of marketing? Then she cares about growth.

What possible challenges surround this person and her goals?

Based on your understanding of this person's goals and challenges, what can you offer? Your offer should be an IDEA, an INSIGHT, or a CONNECTION.

What do you know about customers, operations, or optimization? What do you think is valuable for this person and the business right now? You might even have previous connections or experiences that are relevant to a new challenge the business faces.

# How do I ask for a raise?

Take steps to connect with your influencers and let them know you understand their goals and challenges and have solutions.

Again, you don't need to be "best buddies" with them. You just need to make sure they know you and your work (and how it helps the company's bottom line).

*\*Note: this is just scratching the surface of a process that we call "Influencer Mapping" at The Forem. We spend 2 whole workshops on this during our bootcamp! If you're interested in learning more, [click here](#).*

## #3 Be prepared for more.

The truth is that raises aren't just awarded for current work. They're awarded for future work. Your company is making an investment in you, and they need to know how that will pay off.

When you ask for a raise, be prepared to explain how you're going to do more and be an even more valuable asset to the company. Come up with a clear plan for how you will expand your role and impact.

Practice this a few times so you're ready to make a great impression. You want to give your manager clear, memorable talking points to use when she takes your request to the next level.

# What's Next?

## Congratulations!

If you've read this entire document and you act on the steps we've outlined here, you'll know where you stand as you head into your performance review.

**This is no small accomplishment: it takes most of us years to understand how to navigate our careers.**

(It's mind blowing, right? Your career opportunities really have very little to do with you being "good at your job." It has a lot more to do with knowing the right questions to ask, steps to take, and people to connect with.)

And who has time to teach you that?!

Unless you're lucky enough to have an executive mentor, most of us never learn (or we have to figure it out ourselves over a few decades, which means we miss out on opportunities).

This is why we created The Forem. We saw this big gap in career education, and we've been working hard to fill it and spread the word.

We just scratched the surface of our teachings here. If you're ready to dive into our Career Advancement Playbook and get even more important insights... and do it with a lively cohort of top-talent professionals... then our Level Up Bootcamp might be the right fit for you.

We hold it 3 times a year, and it's coming up in late January 2021!

[Check it out.](#)

And we hope you'll keep in touch with us.

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# Brought to you by...



## **KATIE O'MALLEY**

Sales Leader | Mom | Mentor | X-functional Diplomat

Katie has spent the last 14 years in advertising technology sales, from managing national consortium partners at Yahoo!, to most recently leading multiple technology sales teams during her 9 year tenure at Google. She's covered a wide range of industries during her time at Google, from travel and finance to overseeing the telecom & consumer electronics ad tech business. Katie has significant experience in managing teams through change and succeeding in cross functional organizations. In October 2019, Katie resigned from Google to tackle a new role for a year in the unpaid labor space – managing her three young children at home.



## **ALLI YOUNG**

CEO & Founder, The Forem

After a successful 20+ year career in technology, Alli founded The Forem to unlock opportunities for women across disruptive brands and Fortune 1000 organizations. As CEO, Alli oversees all aspects of The Forem, including corporate training and Executive Coaching.

In her last role, Alli led Americas at Turn, a tech company in the middle of a challenging transition and exit. In her most prominent role, Alli led various sales teams over an 11-year tenure at Google, where she focused on strategic partnerships and aligning customer goals with emerging tech solutions, including the development of a global programmatic strategy which drove several billion in revenue. Alli began her career at Yahoo! and went on to lead creative and marketing strategy at both Deutsch and Mediacom.

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