

FAST FORWARD SAMPLE COMPLETED VISION

I'm incredibly proud of the positive changes I made in my life this year -- both professionally and personally. I feel the most confident and fulfilled that I've ever felt. I was promoted at the beginning of the year and have expanded my scope by being a key liaison to the product team. Our team revenue grew by 10% to \$50M and we increased key accounts invest \$2M+ from 5 to 8. We held revenue for Client X, which was notable given industry dynamics. I developed and maintained relationships with key growth accounts – Susan at Client X, Ron at Client Y and Tom at Client Z. This was a key part that helped our client satisfaction score moved up 5 points as we shift all communications to customer focus. Given the new org support structure we've also been able to reduce cost of sale by 5%.

In my new cross-functional role, I am known as a strong leader and coach who helps people grow. One of my key strengths is developing meaningful relationships with colleagues and clients and I've really leaned into this. I am known for being patient and positive at work – and at home. I am preparing a minimum of 15 minutes for key internal and external meetings so I feel more confident and organized. People are giving me feedback that I am easy to work with and enhancing their ability to do their jobs. I was asked to speak at 2 client/industry functions. Even though I felt uncomfortable, it helped me improve my confidence with large groups.

My team feels heard and supported to be successful professionally and personally. People feel safe to debate, give feedback and make mistakes. When they come to me with questions, I can see I've improved my coaching by listening and asking questions vs. telling people what to do. We eliminated weekend email and people have an opportunity to refuel. Our engagement scores increased by 10 points on top 3 metrics that were pain points the last two years. On a broader scale, 80% of our new hires in the org were people of color and people of color feel they are treated equally and they belong. I feel proud that I've played a vocal part in making this a reality.

One of the best parts of the year has been forming a stronger relationship with my boss Ann Marie. I worked with her EA to get on her calendar for weekly 1:1's and she has a real understanding and appreciation for the value I add to the business. Seeing her more often has made it much easier to talk to get coaching on roadblocks. We have lunch once a quarter and know each other as human beings. I'm also proud of the productive working relationship I've built with Tom. Our teams are now handling conflict real time vs. escalating to us.

I really enjoyed the work I did mentoring more junior employees. I sponsored two people in my department who expressed interest in learning more about product marketing, and I had monthly coffee meetings with four junior employees to help them navigate the organization and their careers.

I am delegating work that is not a good use of time and have cut travel by 30% by planning 4 months in advance and saying 'no' to non-essential trips. This has given me more time at home, which is critical now that Carly and I are parents of two under two. Caleb is adjusting well to his role as a big-brother, and is keeping us curious and laughing. Carly and I have maintained a weekly date night and are tech-free 5 nights a week so that we stay connected. We take one weekend per quarter to stay in a hotel for a romantic getaway.

I became a member of a new boxing studio in town and take lessons weekly. I am sleeping 7 hours a night, eating healthy (no sugar) and working out 3x/week – I feel energized. I prioritized connecting with 3 close friends from college and childhood and make sure we are catching up at least quarterly.

While my parents and siblings are still in California, I speak to them weekly over email, text and FaceTime. I carved out time in my schedule to fly home, or to have them visit, at least once every 6 months. I feel closer to my brother after being surface-level and distracted in our relationship over the last two years. I am grateful for my family's health and financial security. I organized my own finances and feel secure about the next 3 years, paying off debt and saving responsibly.

I am happy, optimistic and feel grateful. I am successful in my job and feel I am on a new path toward growth. I'm so excited for what is next!