

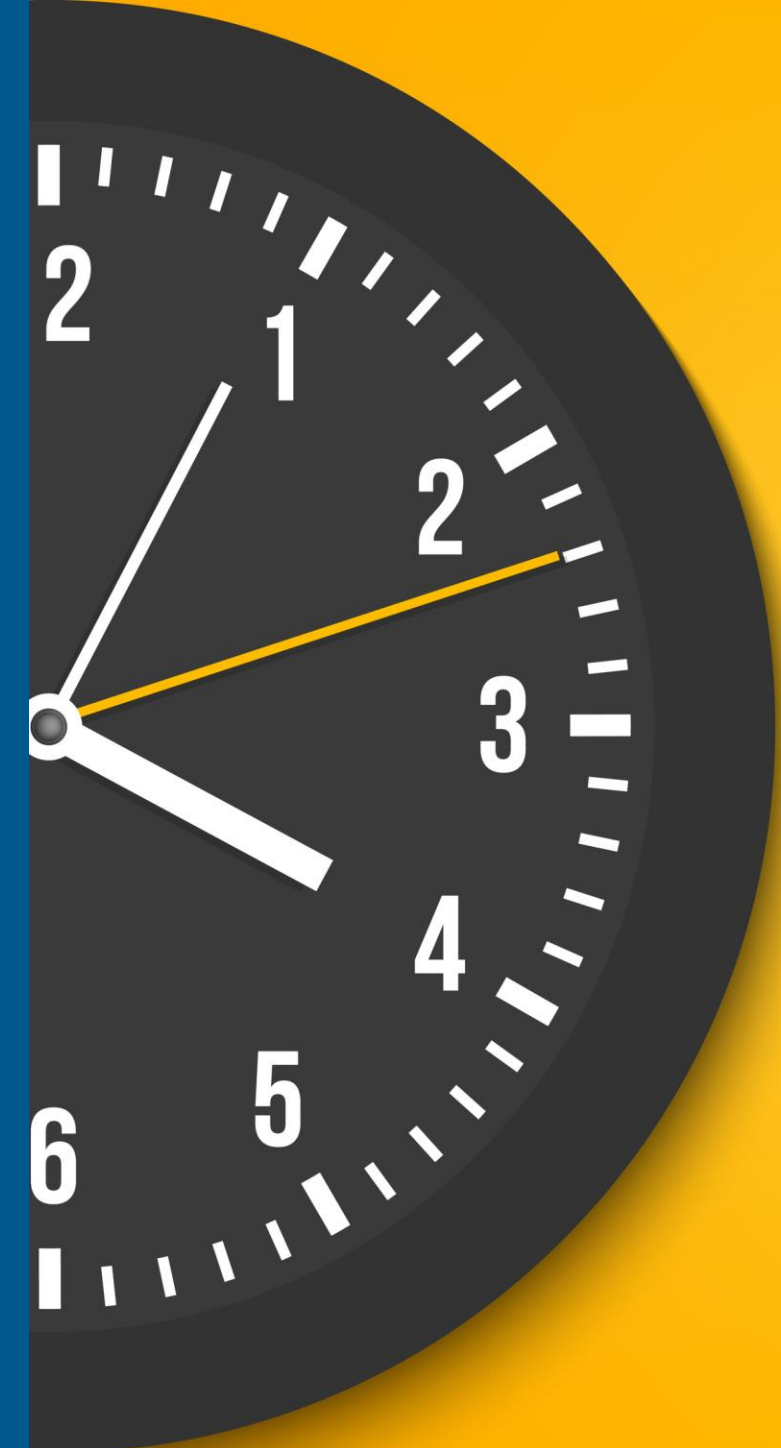


Power Up Your Next Performance Review

Presented by: Madelyn Mackie, Career Activator

IOFM Spring
CONFERENCE & EXPO

How much time did you spend preparing for your last performance review?



Why Most Reviews Fall Flat



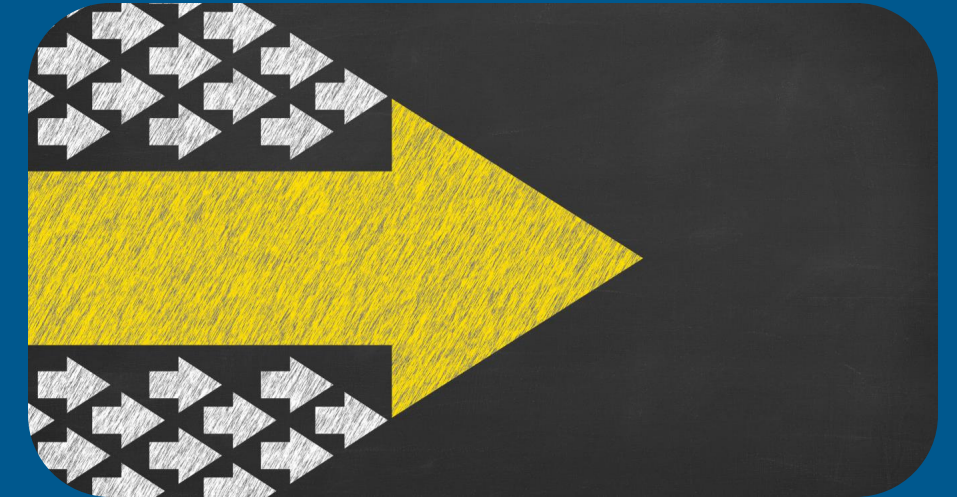
→ No clear narrative

Accomplishments get buried in daily tasks



→ Missing metrics

Impact is described in vague, unmeasurable terms



→ No forward vision

The conversation ends without setting up future growth

Why This Matters for AP & P2P Professionals

- AP and P2P work is high-volume, deadline-driven, and often invisible when it goes well
- Reviews are often the only formal moment your impact is documented for compensation, promotion, and headcount decisions
- Most people walk in under-prepared, then walk out wishing they had said more
- *If you don't tell your story, the reports will tell it for you — and it won't mention you by name.*



Your performance review is an opportunity to grow professionally, financially, and personally





Create



Cultivate



Activate



**Create a
Vision**



**Cultivate Your
Accomplishments**



**Activate for
Future Success**

CREATE — Build Your Vision



Before you walk into that room, know exactly what story you want to tell. CREATE is about intentional preparation — not improvisation.

The Good

Your wins, growth moments, and high-visibility contributions

The Challenging

Obstacles you navigated, lessons learned, and how you adapted

The Ask

What you want next — clarity on growth, role expansion, or recognition

What to Put on Your "Good List"

Think beyond task completion. Your "good" contributions span four dimensions:



Results Delivered

Projects completed on time, under budget, or above target



Relationships Built

Cross-functional partnerships, vendor negotiations, leadership visibility



Process Improvements

Efficiencies created, errors reduced, new systems adopted



Team Contributions

Mentoring, training, or stepping up during peak periods

Owning the Difficult Moments

Addressing challenges honestly — before your manager does — demonstrates maturity and self-awareness. It actually **builds** credibility.



1 Name it clearly

Briefly state the challenge without over-explaining or deflecting

2 Show your response

Describe what you did — course corrections, support sought, pivots made

3 Close with the lesson

What you learned and how it will shape your approach going forward



S

Situation

O

Obstacle

A

Actions

R

Results

Quantify Everything You Can

Time Saved

"Reduced month-end close by 2 days"

Cost Reduced

"Identified \$85K in vendor contract savings"

Accuracy Improved

"Reduced reconciliation errors by 40%"

Revenue Supported

"Financial models supported \$2M budget decision"



S	O	A	R	
SITUATION Focus on one specific project.	OBSTACLES (3) What were the challenges?	ACTIONS (5) What did YOU do? Use "I" language	RESULTS (3) What was completed and improved at the end of the project?	Notes

Align Your Work to Organizational Goals

Managers remember contributions that connect to what the organization cares about. Frame your impact at the right level.

1

Your Task

What you did day-to-day

2

Team Impact

How it helped your team perform

3

Department Goal

Which finance objective it advanced

4

Org Priority

How it ties to the company's strategic direction

Your Mid-Year Check-In Habit



Don't wait for review season. Build a simple documentation habit that keeps your evidence file current all year long.

01

Monthly

02

Quarterly

03

Pre-Review

ACTIVATE — Set Up Future Success

ACTIVATE turns a backward-looking review into a forward-looking career conversation. This is where you plant the seeds for promotion, salary growth, and professional development.



The Three Conversations Within the Review – Pick 1

Compensation

Come prepared with market data, your documented impact, and a clear, confident ask. Tie the request to value delivered.

Promotion

Make the case by demonstrating you're already operating at the next level — and name the role or scope you're targeting.

Development

Propose specific learning goals, certifications, or stretch assignments that align your growth with business needs.

Making the Salary Ask With Confidence

Compensation conversations feel uncomfortable only when you're not prepared. Build your case before you walk in.

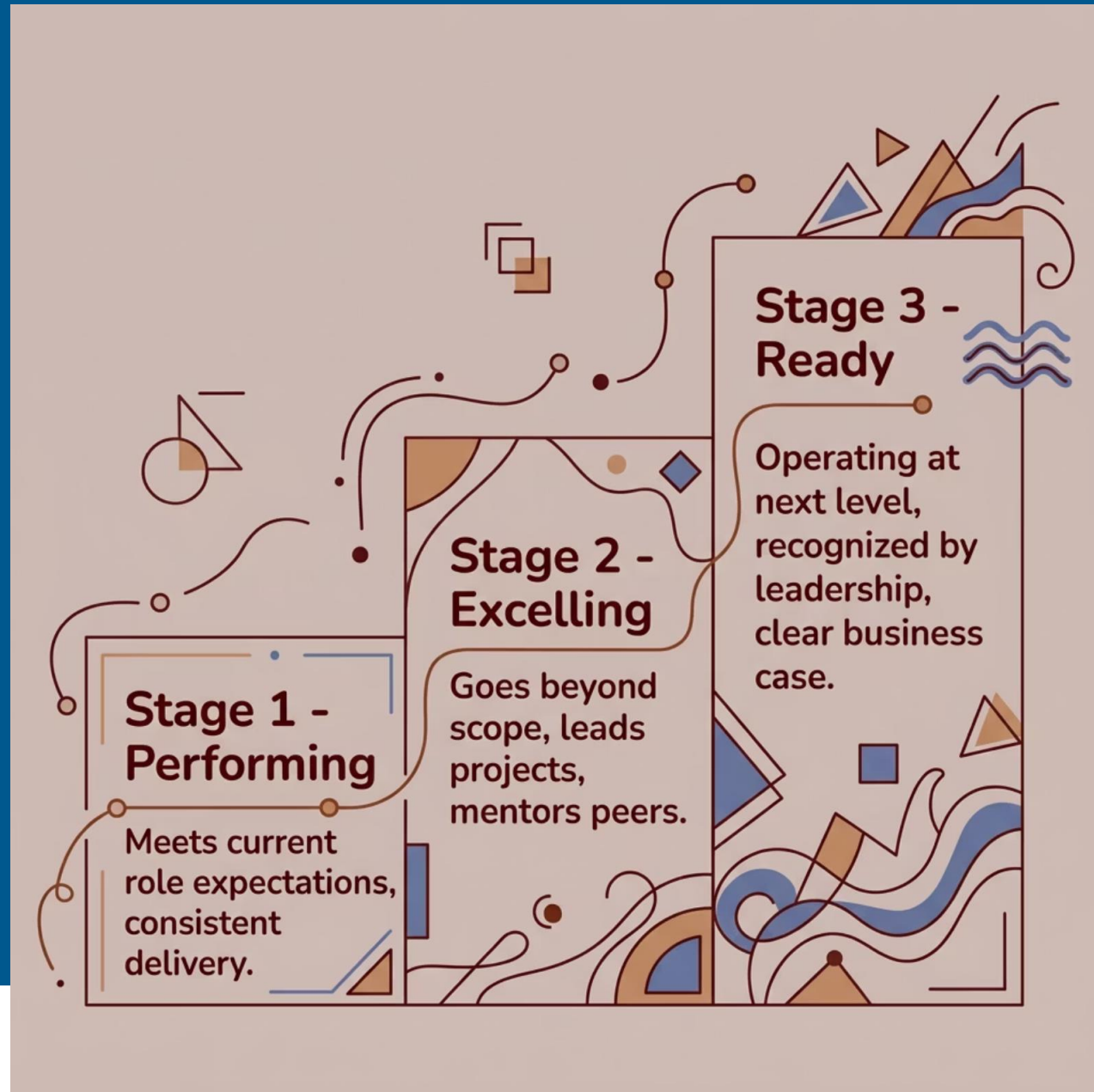


Know your number

Lead with value

Leave room to negotiate

Positioning Yourself for Promotion



Promotions are rarely given — they're claimed. The strongest candidates make it easy for their manager to say yes by demonstrating next-level performance *before* the title change.

- ❑ Ask your manager: "What would 'ready for promotion' look like to you?" — and document the answer.

Professional Development That Gets Approved

Tie your development requests directly to business outcomes. Managers are more likely to invest in growth that benefits the team.



Certifications

CPA, CMA, CGMA — or emerging credentials like data analytics and FP&A designations



Conferences & Events

IOFM, AFP, IMA — frame attendance as knowledge that returns to your team



Mentoring & Coaching

Request a formal mentor or sponsor relationship with a senior finance leader

Your Most Important Career Conversation



"Your performance review is not an evaluation of your past — it's a negotiation for your future. Prepare accordingly."

3x

More Likely to Advance

Professionals who actively prepare and document impact vs. those who don't

67%

Never Make the Ask

Of employees who want a raise or promotion but don't raise it in their review

5 min

Daily Habit

Is all it takes to maintain an evidence file that transforms your next review



You're Ready. Power Up.

CREATE

Know your story before the conversation begins

CULTIVATE

Let your evidence speak louder than your job description

ACTIVATE

Turn every review into a launchpad for what's next

ACTION ITEMS: Putting It All Together: Your Review Prep Checklist

1

CREATE Your Vision

List wins, challenges, and your key ask

2

CULTIVATE Your Evidence

Compile top 5 projects with SARA structure and metrics

3

ACTIVATE Your Future

Prepare talking points for comp, promotion, and development



QUESTIONS?



REMINDER!

If you checked in for NASBA CPE credit, check out at iofm.cnf.io

MADelyn MACKIE & ASSOC



Madelyn Mackie
Chief Career Activator
**Outplacement & Career
Management Services**
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