



MONTH YEAR
NAME

Performance Update

NICK LANAHAN

RANK: S3

SUB-COMPETENCY: PRODUCT MANAGEMENT

COUNSELOR: KEN FONG

XX%

Effective Util. YTD

Overall: On Track

of LEAD Reviews: 4
Missed Timesheets: 0
CPE Hours: 4
Independence Compliant: Yes

Promotion Candidate: Yes
If Yes, Promotion Cycle: 1
PPMD Support: Fred?
Abhishek? Steve?
Account Support: Yes?

BETTER WORKING WORLD:CLIENT/ CLIENT VALUE

Sales/Revenue/Profit; Client Relationships; Connected; Proactive; Insightful

[FRB Project Forrest / JPMC]

- Contributed to the communications task force for Business Banking Lending clients, crafting a strategic Communications Strategy with a User Journey for FRB customers facing product discontinuation. This effort generated content and meticulously crafted messages, alleviating the expected negative sentiments of affected customers.
- Went beyond assigned responsibilities to support the Business Banking Lending Product Team at Chase. Collaborated on modifying the Line of Credit Application process for former FRB customers, setting a benchmark for other EY and Chase teams in developing client communications and processes.

BETTER ME / DEVELOP SELF

Soft skills; Sector; Leadership; Curiosity; Well-being; Teaming; Inspiring; Belonging

- Maintains an ongoing role as a coach, leader, and educator, guiding diverse teams at EY in both internal initiatives and external client-facing projects.
- Pioneered an Atlassian System Administrative training program that not only established the first DET Atlassian instance but also empowered DET to apply this knowledge and best practice effectively with our clients.

BETTER WORKING WORLD (BUSINESS/SOCIETY) / MARKET IMPACT

Thought Leadership; Community Participation; Impactful; Socially/Environmentally responsible

- Led a team of 5+ Seniors and above as the lead on a POV for NCFU. Created innovative frameworks and models for financial steering and value traceability, drawing from best practices and prior client experience. This initiative provided NCFU with a foundation for enhancing their value creation and traceability capabilities within their products, contributing to their growth.
- Collaborated as a Product Coach for the Next Generation Product Incubation Program and was an active member of the PMaaS team, contributing to the formulation of new product ideas and strategies. Conducted thorough research utilizing the product strategy framework created as a foundation. The outcome was the identification of critical gaps in the financial services industry and the product management discipline, suggesting potential product-market fit. This discovery has sparked the consideration of developing this idea into a business case and potentially building it at EY.

AREAS OF DEVELOPMENT / SUPPORT NEEDED / EXPERIENCES DESIRED

New soft skills; Aspirations; Coaching areas

- Needs to broaden experiences and work on new engagements with new teams across DET
- Desires hands on Product Management experience of a Product



MONTH YEAR
NAME

Promotion Case

KEY ACCOMPLISHMENTS

BETTER ME (LEADERSHIP, WELL-BEING, AGILITY, CURIOSITY)

Things to highlight include: agility to hard client projects/demands, examples of educating yourself/others, demonstrating work/life co-existence and balance

- Proactively embraced a steep learning curve as a new EY member, rapidly mastering Agile Product Management through self-study and the TCH Agile Transformation engagement. Became a Subject Matter Expert (SME) and was invited to train other EY teams (across the world), offering invaluable insights for multiple proposals and Points of View (POVs).
- Self-taught many skills including Jira and Confluence to the system administrator level, surpassing the client's system administrators' capabilities, and innovatively designed a modular workflow and issue scheme for the client. This update streamlined their agile process, created a common operating picture, and facilitated cross-organizational metric comparisons.

BETTER US (TEAMING, MENTORING, INSPIRING, BELONGING)

Things to highlight include: experience Managing EY or client teams/projects, mentoring colleagues, technical skills you’ve developed or improvements you’ve made to a process

- Led and took ownership of the EY Product Management Playbook, consolidating best practices from firsthand experience, research, and debriefs from various client engagements resulting in the creation of a comprehensive Playbook, adopted in 4 continents across multiple industries, and used by numerous global EY teams. This achievement significantly bolstered the credibility of the DET practice.
- Leveraged 12+ years of leadership experience as an experienced hire, making it a personal mission to mentor and coach younger peers within the practice. By dedicating time, engaging in challenging conversations, and aiding others in discovering their purpose, he enhanced overall confidence, performance, and trust within DET.

BETTER WORKING WORLD: CLIENT (CLIENT RELATIONSHIPS, CONNECTED, INSIGHTFUL)

Things to highlight include: client relationships you’ve built, successful projects you’ve delivered and any accolades from clients

- Thrived in a new role without prior experience, collaborating with the JPMC marketing team and the EY Business Banking team, crafting a strategic communications strategy and critical communications content for legacy clients during a bank acquisition by JPMC. Received accolades from the client and EY teams during the transition for the quality of work.
- Cultivated extensive relationships with stakeholders across various functions at TCH and acted as the lead on the account team of 4 Seniors. Effectively coordinates efforts, strategies, action items, and initiatives across the account creating an efficient and effective relationship and account management process, widely adopted across 6 Fields of Play and 8 Partners at EY. This successful implementation has significantly contributed to earning and maintaining business from the account.

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AML1 Feel free to break these into multiple pages if you need more space
Amanda M Lynch, 1/13/2023

KEY ACCOMPLISHMENTS

BETTER WORKING WORLD: BUSINESS (THOUGHT LEADERSHIP, COMMERCIAL, IMPACTFUL)

Things to highlight include: POVs and examples where you've brought unique thinking to a problem, practice development or business development

- Transformed intricate concepts observed during client work on product strategy and metrics into tangible Frameworks. These frameworks distilled complex ideas into straightforward diagrams that have not only been used with other clients but also hold significant potential for application with future clients, contributing to a more effective and streamlined approach to Product Management
- Exercised initiative and led multiple initiatives with over 20 Senior and Staff-level consultants. Led many Proposals and Points of View (POVs) on Agile Operating Models, including aspects of people, processes, tools, and governance within Product Management. These efforts effectively communicated our value to clients, emphasizing expertise in areas like process design, product strategy, finance, product metrics, and Product Tooling.

QUALITY, RISK MANAGEMENT AND TECHNICAL EXCELLENCE (UTILIZATION, COMPLIANCE, LEARNING, RISK, INDEPENDENCE)

Things to highlight include: special recognition for a high-quality deliverable, fulfilling the operational KPIs

- Assumed diverse roles in TCH, such as Scrum Master, Agile Coach, Agile Transformation Strategy Lead, and Jira/Confluence Configuration Analyst. Consistently delivered high-quality work, earning client praise, and securing four engagement extensions plus an additional one.

KEY HIGHLIGHTS AT A GLANCE

"Nick is one of the best Colleagues I have ever worked with"

- LEAD Feedback from EY Manager

"He is always willing to dig in and figure things out. He is quick to respond and ready to help"

- Marsha Douglas, Executive Director @ JMPC

XX

EFFECTIVE
UTILIZATION

XX

PRIOR YEAR
UTILIZATION

RECOGNITION AWARDS

- \$500+ in RAC awards

ENGAGEMENTS



- TCH Agile Transformation
- TCH Jira / Confluence Implementation

JPMORGAN CHASE & CO.

- JPMC Partner Channel
- JPMC FRB Project Forrest



H&M



Scotiabank Regional Product Guide

PIPELINE & SALES

- UNKNOWN

PPMD & ACCOUNT SUPPORT

- TCH ACCOUNT TEAM LEAD

NICK LANAHAN

RANK: SENIOR 2

SUB-COMPETENCY: PRODUCT MANAGEMENT

COUNSELOR: KEN FONG

89.6%

Effective Util. YTD

Overall: On Track

of LEAD Reviews: 2
Missed Timesheets: 0
CPE Hours: 30.7
Independence Compliant: Yes

Promotion Candidate: Yes
If Yes, Promotion Cycle: FY24
PPMD Support:
Account Support:

BETTER WORKING WORLD:CLIENT/ CLIENT VALUE

Sales/Revenue/Profit; Client Relationships; Connected; Proactive; Insightful

Partner Channel / JPMC

- Organized and supported multiple workshops with the client to design an operating model blueprint that communicates where their teams that fall under a new product fit in the organization and how they affect the Operating Model
- Developed detailed process diagrams for 6 new offerings under a new product at JPMC by working with the Product Team, which ultimately helped refine the new operating model, and how their team would interact and support other teams and Partners at JPMC

Regional Product Guide / Scotiabank

- Worked with EY-CA team on a proposal to communicate the value that our Product Management Playbook can offer to Scotiabank, who is developing a Regional Product Guide in the LATAM countries, winning the engagement during a difficult economic period.

BETTER WORKING WORLD (BUSINESS/SOCIETY) / MARKET IMPACT

Thought Leadership; Community Participation; Impactful; Socially/Environmentally responsible

- Provided training to other EY teams in the U.S. and UK as well as a client team working with DET who were new to working in an agile environment and new to Agile tooling (Jira and Confluence). This increased their knowledge and confidence to operate in this environment resulting in two Bravo awards.
- Developed the research objectives, strategy, and overall plan to help EY and our clients understand the Product Management tooling landscape. This resulted in a further understanding of the clients pain points, and future opportunities for EY to work and support their challenges.
- Developed multiple frameworks to simplify and summarize key Product Management concepts such as Product Strategy and Product Management Metrics. These frameworks enable EY and client teams to quickly implement the content in real world operations.

BETTER ME / DEVELOP SELF

Soft skills; Sector; Leadership; Curiosity; Well-being; Teaming; Inspiring; Belonging

- Recruited and spent multiple hours per week working with an IdeaLab team who had no connection to DET, and was new to Product Management and Design Thinking
- Continuously learned and incorporated Product Management content into the Product Playbook. Used this knowledge to further develop existing, and create new sections of the Product Management Playbook.
- Developed and mentored 3 Seniors, and 4 Staff by providing the overall guidance on the PM Tooling Research Project and Product Playbook Content Development Strategy through one on one coaching and feedback.
- Coached and mentored another Senior at EY to take over and Lead the Product Management Playbook Content Development workstream of the PMaaS offering when my role expanded beyond development to strategy and sales.

AREAS OF DEVELOPMENT / SUPPORT NEEDED / EXPERIENCES DESIRED

New soft skills; Aspirations; Coaching areas

- Needs to broaden experiences and work on new engagements with new teams across DET
- Desires hands on Product Management experience of a single product to apply knowledge learned
- Experience working with uncertainty and change from the plan

NICK LANAHAN

RANK: SENIOR 2

SUB-COMPETENCY: PRODUCT MANAGEMENT

COUNSELOR: KEN FONG

107%

Effective Util. YTD

Overall: On Track

of LEAD Reviews: 2
Missed Timesheets: 0
CPE Hours: 5.3
Independence Compliant: Yes

Promotion Candidate: Yes
If Yes, Promotion Cycle: AUG 23
PPMD Support: X
Account Support: X

BETTER WORKING WORLD:CLIENT/ CLIENT VALUE

Sales/Revenue/Profit; Client Relationships; Connected; Proactive; Insightful

Partner Channel / JPMC

- Developed a product strategy framework used as a client input to help develop an operating model and implementation roadmap that supported their goals and objectives for a new product at JPMC
- Fielded an ad-hoc request from the client to develop a content management strategy and implementation plan that significantly improved their content organization, communication, and leadership decision making capability.

Agile Product Playbook Implementation / EY-UK

- Served as an SME to the first engagement where DET sold and globally implemented the playbook to another EY team in the UK maintaining a 45% margin on the engagement.
- As an SME to the Playbook implementation engagement, Nick help plan and execute training for 20 EY UK team members on Confluence to include admin, integrations, best practices, playbook implementation, and editing tips and tricks so that they could pass this information on to the client H&M

BETTER WORKING WORLD (BUSINESS/SOCIETY) / MARKET IMPACT

Thought Leadership; Community Participation; Impactful; Socially/Environmentally responsible

- Helped lead a team of 6 Seniors and Staffs to conduct Product Management Tooling research across the Product Development lifecycle resulting in a POV from DET on Product Management Tool ratings and opportunities across multiple industries
- Continues to develop a new asset (Digital Agile Product Playbook) using industry best practices from Tech and Financial Services to create a powerful and useful tool to accelerate Product Management Engagements

BETTER ME / DEVELOP SELF

Soft skills; Sector; Leadership; Curiosity; Well-being; Teaming; Inspiring; Belonging

- Began working on two EY Badges (Process Innovation and Product management) and has already used the knowledge learned for the client creating new processes for a new Product Team, and internally on the Strategy and Metrics section of the Agile Playbook.
- Continuously coaches and teaches diverse teams across EY during the engagement (Lean Canvas and Strategy) and outside of the engagement (PMaaS strategy, metrics, and UK Engagement).
- Spends significant time coaching and mentoring new Staff members of EY on Product Management Topics, and their progression towards becoming a DET member.

AREAS OF DEVELOPMENT / SUPPORT NEEDED / EXPERIENCES DESIRED

New soft skills; Aspirations; Coaching areas

- Needs to broaden experiences and work on new engagements with new teams across DET
- Desires hands on Product Management experience of a Product

KEY ACCOMPLISHMENTS

BETTER ME (LEADERSHIP, WELL-BEING, AGILITY, CURIOSITY)

Things to highlight include: agility to hard client projects/demands, examples of educating yourself/others, demonstrating work/life co-existence and balance

- Badges, applying learning, teaching others what I have learned

BETTER US (TEAMING, MENTORING, INSPIRING, BELONGING)

Things to highlight include: experience Managing EY or client teams/projects, mentoring colleagues, technical skills you’ve developed or improvements you’ve made to a process

- Coaching informally, Formal coaching, IdeaLab mentor (finals team), Became an SME on Jira and Confluence on my own,

BETTER WORKING WORLD: CLIENT (CLIENT RELATIONSHIPS, CONNECTED, INSIGHTFUL)

Things to highlight include: client relationships you’ve built, successful projects you’ve delivered and any accolades from clients

- Build strong relationship with TCH they want coaching
- Developed frameworks and processes used by client and internally

BETTER WORKING WORLD: BUSINESS (THOUGHT LEADERSHIP, COMMERICAL, IMPACTFUL)

Things to highlight include: POVs and examples where you’ve brought unique thinking to a problem, practice development or business development

- PM Tooling POV

QUALITY, RISK MANAGEMENT AND TECHNICAL EXCELLENCE (UTILIZATION, COMPLIANCE, LEARNING, RISK, INDEPENDENCE)

Things to highlight include: special recognition for a high-quality deliverable, fulfilling the operational KPIs

- IDK.

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AML2 Feel free to break these into multiple pages if you need more space
Amanda M Lynch, 1/13/2023

KEY HIGHLIGHTS AT A GLANCE

“

Quote from a client or feedback reviewer

- Name, Role

107% 108%

EFFECTIVE
UTILIZATION

PRIOR YEAR
UTILIZATION

RECOGNITION AWARDS

ENGAGEMENTS



PROJECT NAME



PROJECT NAME



PROJECT NAME



PROJECT NAME



PROJECT NAME

PIPELINE & SALES

PPMD & ACCOUNT SUPPORT

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KMC3 You can include prior year engagements that may support your case

Kathleen M Calabro, 10/15/2020

KMC4 These are example categories to highlight. You can include others that you think will be good to highlight

Kathleen M Calabro, 10/15/2020