

MAKING THE CASE FOR A PROMOTION

Preparation is critical for any performance review or promotion conversation. Use this worksheet to prepare for your next conversation, or share it with team members so they can make the case to you.

Define Your Career Goals:

It is important to know what you want, both in the immediate and long term. Take the time to assess your career goals. This will help you understand your motivation for a promotion or raise, and will show your manager you are thoughtful and strategic about your career.

Immediate (3-12 months):

Short Term (1-2 years):

Mid Term (5-10 years):

Long Term (10+ years):

Know What You Are Asking For:

Why are you asking for this promotion/raise? Are you seeking more responsibility? More money? The title? Project Management? People Management? New Skills?

State Your Goal:

Demonstrate Your Value:

Make a list of key accomplishments (especially those outside of your official responsibilities) that demonstrate your strengths and tell your manager how you want to grow. The more hard numbers and notable achievements you demonstrate, the easier it will be for your manager to justify your promotion to firm management. Provide actual examples, rather than general terms or ideas. This shows your employer that you are already performing at your desired position's level, rather than making the case about why you would be good at that position.

Key Accomplishments:

Understand the Market:

Do your research. Review salary surveys, get numbers from peers, or open searches. Provide facts and hard data, rather than general terms. Understand where you fit into the market, paying close attention to region, titles, years of experience, firm size, and job responsibilities. The more information you have, the better prepared you will be for the conversation, and the less work your manager has to do making your case.

Your Current Salary:

Your Goal Salary:

"Market" Salary:

Additional Considerations:

Consider employer politics, internal equity, and factors that may impact your ability to receive a promotion or raise, such as:

- The experience level and tenure of your team. How do you fit in? Who else is due for a promotion?
- If you are promoted, does that mean a similarly situated person in HR, Marketing, or your counterpart in another office will also need to be promoted?
- How and when do promotions take place? Annually? Do they ever occur mid-year? If so, under what circumstances?