

ADVANCEMENT CONVERSATION GUIDE

BEFORE THE CONVERSATION

Get clear on the move you want, what the organization needs, and what people need to see from you.

01 Blueprint Check: prepare your facts

The role, responsibility, or scope I want to move toward

One example of my work that shows readiness

What did I handle, and what improved because of it?

What I still need to understand

Separate what you know from what you are assuming.

02 Open the conversation

“I want to work toward [role or responsibility]. I’d like to understand what that requires here and where I need to build more evidence.”

03 Ask for information you can use

THE NEED

What business need would that role or responsibility help solve?

READINESS

What would you need to see me handle to consider me ready?

EVIDENCE

Where could I demonstrate that ability in my current work?

THE DECISION

Who else is involved, and what affects whether or when a move is possible?

Type into the shaded boxes. Save a copy for each conversation.

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DURING AND AFTER THE CONVERSATION

Institutional Literacy: understand how the decision works. Strategic Positioning: make your readiness visible through relevant work.

Conversation with

Date

04 Capture what was actually said

What they need to see: specific work, behavior, or results

What affects the decision: people, timing, openings, or budget

My next action and due date

Their agreed action or support

When we will revisit this and what I will bring

05 Operator Moves: get specific

If you hear “keep doing what you’re doing”: “What specifically should I keep doing, and what would show I’m ready for more?”

If there is no opening: “Is the constraint my readiness, an available role, or both? What would need to change before we revisit it?”

If they suggest more work: “What would this help demonstrate, how will we review it, and what should I reprioritize to make room?”

Close and confirm: “I’ll do [action] by [date]. We’ll reconnect on [date] to review [evidence]. Is that what we agreed?” Send a short recap afterward.