

Running Credible Career and Promotion Conversations

How to Replace Annual PDR Theatre With Clear Evidence and Real Commitments

A credible conversation tells the person where they stand, what changes the decision and who will do what next.

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Document Status and Use

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Purpose

A manager-side conversation manual for explaining current performance, next-role readiness, organisational opportunity, remuneration constraints, manager support and the employee's next evidence.

Audience

Line managers, commercial managers, project leaders and employees preparing for serious career conversations.

How to Use This Manual

1. Read the relevant chapter before a live conversation, review or decision—not after the consequence has already landed.
2. Apply the method to current project work. The suite is designed to change observable behaviour, not merely increase awareness.
3. Record the decision, action, owner, evidence and review date produced by the exercise.
4. Use the related manuals where the issue crosses career, communication, judgement, leadership or stakeholder boundaries.

Contents

- 5. 1. Separate the Questions
- 6. 2. Establish the Conversation Rhythm
- 7. 3. Start With the Employee's Version
- 8. 4. State Where They Stand
- 9. 5. Give Feedback That Can Be Used
- 10. 6. Deliver the Honest Not Yet
- 11. 7. When the Employee Disagrees
- 12. 8. Handle Emotion, Frustration and Wellbeing
- 13. 9. Build the Plan Around Live Work
- 14. 10. Record Commitments and Close the Loop
- 15. 11. Build and Calibrate the Promotion Case
- 16. 12. Communicate Yes, Not Yet or No
- 17. 13. Discuss Title, Band, Pay and Bonus Honestly

1. Separate the Questions

Performance, potential, readiness, appetite, opportunity, promotion and remuneration are related but not interchangeable.

Career conversations fail when a single emotional question—"Why haven't I been promoted?"—is answered with a blend of vague praise, structural excuses and promises nobody controls.

These four concepts are related but not interchangeable:

18. Performance is the value produced in the current role.
19. Potential is the level a person may eventually have capacity to reach.
20. Readiness is the evidence that they can carry the next role now with acceptable support and risk.
21. Appetite is whether they want the work, pressure, mobility and consequences attached to that role.

A high performer can have limited appetite for management. A high-potential employee can be unready today. A technically ready person may not want the geographic disruption attached to the available role. Keep the four assessments separate.

EXAMPLE - THE SENIOR CA WHO HAD ARRIVED A CA compares themselves with a long-serving Senior CA and concludes the promotion standard must be low. The Senior CA is reliable, valuable and happy at that level, but has no interest in managing people or carrying whole-project risk. They are not the benchmark for upward mobility; the next role is.

Readiness is the employee capability evidenced now. Opportunity is the actual role, project, budget and organisational need. Decision is the formal exercise of company authority. Keeping these separate allows a manager to say that someone is ready without promising a vacancy, or that a vacancy exists without pretending the employee is ready.

Question Separation

Question	Current answer / evidence
Current-role performance	
Next-role readiness	
Employee appetite / life constraints	
Structural opportunity	
Promotion decision / authority	
Title, band, pay and bonus	

2. Establish the Conversation Rhythm

The annual review should consolidate known conversations, not reveal a year's worth of surprise.

Use short one-on-ones for live work, quarterly reviews for readiness and opportunity, and an annual reset for direction and total role value.

Career discussions should not begin at the annual review. Use short, regular conversations supported by a deeper quarterly review. The rhythm should cover current performance, next-role evidence, work access, employee priorities and any change in opportunity or retention risk.

Separate the career discussion from immediate package firefighting. If every one-on-one is consumed by work status, the employee will eventually raise their future in a moment of frustration rather than in a useful planning conversation.

SIMPLE RHYTHM Monthly: performance and friction. Quarterly: career direction and evidence. Before formal review: calibration and no surprises. After review: actions, owners and dates.

Agree what will be reviewed, what evidence is required, who owns each action and when the next discussion will occur. Between review points, both manager and employee return their attention to delivery. Career conversations should create clarity, not become an always-open negotiation.

Employee Guide cross-reference: Bounded Career Management and Stress-Test Your Value Proposition.

3. Start With the Employee's Version

Understanding is not agreement; it is the beginning of an accurate diagnosis.

Ask what the person wants, what they believe they demonstrate, where they feel blocked and what life constraints matter. Reflect the case before giving the manager assessment.

Before giving your assessment, understand theirs. Ask what role they want, why they want it, what evidence they believe supports the case, what trade-offs they will accept and what they think is blocking progress.

Listening first reveals mismatched assumptions. The employee may think the issue is technical skill while the manager is concerned about reliability. They may be asking for a title when the real issue is money, location or feeling unseen.

CAREER DIAGNOSTIC "What are you trying to move towards? What do you believe you already demonstrate? What do you think I or the business still needs to see? What would make staying here clearly worthwhile for the next two years?" EMPLOYEE GUIDE ROUTE Refer to Employee Guide Chapters 68-69 and the Appendix. Recommended activity: Development Conversation Planner.

Operating Checks

22. Do not interrupt the first account with corrections.
23. Ask for examples and the comparison being used.
24. Identify whether the issue is role, manager, project, money, workload, recognition or future pathway.
25. Confirm what the person most needs from the conversation.

4. State Where They Stand

Ambiguity is often harder to carry than a difficult answer.

Give a current assessment of performance and readiness, the evidence behind it and whether a realistic opportunity is visible. Avoid false precision and labels without examples.

Employees can tolerate a difficult answer better than indefinite ambiguity. Give a current position: performing below, at or above the present role; early, developing, nearly ready or ready for the next; and whether a realistic opportunity is visible.

Avoid false precision. A readiness score is a discussion tool, not a mechanical promotion entitlement. If you use an eight-and-a-half-out-of-ten analogy, identify what the missing one-and-a-half actually represents and how it can be evidenced.

USEFUL LANGUAGE "You are performing strongly in the current role and are close to Senior CA readiness. The two gaps are independent ownership of a difficult final account and evidence that you can develop a junior without taking the work back. I can create both opportunities this quarter. I cannot yet promise a vacant role."

Useful language

EXAMPLE *'You are performing strongly in the current role and are close to Contracts Manager readiness. The two missing pieces are independent ownership of a difficult final account and evidence that you can develop a junior without taking the work back. I can create both opportunities this quarter. I cannot yet promise a vacant role.'*

5. Give Feedback That Can Be Used

Useful feedback names behaviour, consequence, required standard and the next practice opportunity.

'Be more commercial' and 'show more maturity' force the employee to decode a private meaning. Use observable examples and invite correction where facts may be incomplete.

Good feedback identifies the behaviour, the consequence, the expected standard and the next opportunity to practise. "Be more commercial" or "show more maturity" is not usable. It forces the employee to decode the manager's private meaning.

Give enough examples to establish a pattern, not an indictment. Invite correction where the facts may be incomplete. Then agree on the observable change.

FEEDBACK MODEL "In the last two forecast reviews, you presented the movement but not the decision required. The team spent the meeting reconstructing your recommendation. At Senior CA level I expect the decision, commercial effect and requested authority first. You will lead that section next month using the one-page format."

Feedback Builder

Element	Notes
Observed behaviour	
Consequence	
Required standard	
Next live practice	
Evidence / reviewer	
Review date	

6. Deliver the Honest Not Yet

Not yet is credible only when the gap and pathway are real.

Explain what evidence is missing, why it matters, what work could produce it and what remains outside the manager's control. If no credible path exists, do not substitute endless development activity.

"Not yet" is credible only when the manager can explain the gap, provide access to close it and set a review point. Without those elements, it becomes a delay phrase that protects the organisation while consuming the employee's time.

Do not add every desirable trait to the list. Identify the two or three gaps that would materially change the decision. If the real issue is opportunity, do not invent another development program.

*KEY TAKEAWAY Two honest gaps with live opportunities and a date are more useful than a page of generic competencies. EMPLOYEE GUIDE ROUTE Refer to Employee Guide Chapters 19-21.
Recommended activity: 90-Day Readiness Plan.*

7. When the Employee Disagrees

Disagreement should improve the evidence, not become a contest about gratitude or loyalty.

Ask what facts, comparison or outcome the employee believes the assessment misses. Test the case and agree how disputed evidence will be reviewed.

Disagreement is not insubordination. The employee may hold evidence you have not seen, interpret the role differently or be reacting to inconsistent standards. Ask them to present specific examples and test those examples against the next-role consequence.

If you remain unconvinced, say so without demanding agreement. The objective is clarity, not forced acceptance. Offer a second calibrated view where appropriate and record what would change your assessment.

USEFUL LANGUAGE "You do not have to agree with my assessment today. I do need to be clear that this is the assessment I can currently defend. Bring me the evidence you think I have missed, and we will test it against the same role standard."

Operating Checks

26. Do not recruit hierarchy to end a reasonable challenge.
27. Distinguish disagreement from conduct.
28. Offer calibration or a second reviewer where appropriate.
29. Record the point of difference and the evidence that would change either view.

8. Handle Emotion, Frustration and Wellbeing

The manager can hold a difficult conversation without diagnosing or becoming the employee's clinician.

Acknowledge emotion, slow the conversation, identify immediate safety or wellbeing concerns and connect formal support where required. Return to the decision when the person is able.

Promotion, pay and identity are emotionally loaded. A disappointing decision can activate financial anxiety, shame, anger or fear that years of effort have been wasted. Allow the reaction without turning the conversation into therapy or surrendering the standard.

If distress appears persistent, severe or connected to safety, burnout or mental illness, use the organisation's support pathways and professional services. Managers should notice, listen and act appropriately; they should not diagnose or become the employee's sole counsellor.

MANAGER POSITION Regulate the room before solving the problem. A person who feels ambushed will hear defence as dismissal and detail as spin. EMPLOYEE GUIDE ROUTE Refer to Employee Guide Chapters 44, 48 and 55. Recommended activity: 'What's Actually Going On?' review before deciding.

Operating Checks

30. Use the employer's wellbeing, EAP and emergency pathways.
31. Escalate immediate safety risk through required channels.
32. Keep personal health information restricted to those who need it.
33. Do not use a mental-health label to dismiss a substantive workplace issue.

9. Build the Plan Around Live Work

A development plan is credible when the project can point to the work, authority, support and evidence.

Choose no more than three priorities and attach each to a real package, meeting, review, negotiation or leadership responsibility.

Capabilities develop fastest when attached to real consequences. Use procurement, final accounts, forecasts, claims, client meetings, team leadership and project transitions as deliberate development assignments. Define the skill being tested and the evidence to be captured.

Courses can support language and technique, but they cannot substitute for ownership. The plan should identify work access, support, authority, witnesses and review dates.

EXAMPLE - ONE PACKAGE, FOUR CAPABILITIES A Senior CA is given a distressed services package. The assignment is designed to test commercial diagnosis, stakeholder alignment, junior delegation and executive briefing. The manager reviews those four capabilities, not merely whether the package eventually closes.

90-Day Development Plan

Priority behaviour	Practice ground	Support / reviewer	Evidence at day 90

10. Record Commitments and Close the Loop

Broken manager commitments often damage trust more than the original answer.

Record employee action, manager action, owner, date and decision forum. If circumstances change, explain early and set a new position.

Career conversations become corrosive when both parties remember different promises. Record the employee's goal, current assessment, agreed evidence, development access, decision owner and review date. Keep the record short enough to use.

When the date arrives, close the loop even if nothing has changed. Silence after a promised review communicates that the manager's word is optional.

***PRACTICAL RULE** Every career conversation should end with an owner, an action and a date. If the answer depends on someone else, the manager still owns the update.*

Conversation Record

Commitment	Owner	Due / forum	Closed / revised

11. Build and Calibrate the Promotion Case

The manager's name sits beside the promotion after the conversation has ended.

Assemble current-role performance, next-role evidence, judgement, stakeholder trust, people leverage, business need and risk controls. Calibrate against the target role and comparable standards.

A promotion gives a person more authority, broader consequences and greater visibility. The organisation is deciding whether the person can be trusted to represent it at that level when information is incomplete and supervision is lighter. This is why time served and current-role effort are not enough.

The risk is not only that the employee struggles. A poor promotion can damage clients, subcontractors, team confidence, forecasts and the credibility of everyone who supported the decision. Managers should explain the risk without making promotion sound like a favour.

KEY TAKEAWAY Promotion is not a trophy for past work. It is a forward-looking decision about the work and consequences the person can safely carry next.

In a well-run organisation, a manager who puts someone forward places part of their own reputation beside the candidate. Senior leaders will remember who assured them that the person was ready. If the promotion fails spectacularly, the judgement of the sponsor is questioned as well.

This exposure creates useful friction. It filters out cases supported only to stop complaints or temporarily retain someone. It can also create excessive caution, particularly when the manager is insecure or dependent on the employee remaining in place. Recognise both forces.

MANAGER TEST Would I be comfortable explaining this recommendation to the executive team six months after the promotion, using the evidence available today?

A defensible submission connects the next role to evidence from several perspectives. It should cover current performance, next-level examples, stakeholder trust, development completed, remaining support, role need and the risks of promotion or delay.

Do not bury the case in adjectives. "High potential, hard working and well liked" is weaker than three short examples showing decisions, consequences and independent reliance.

PROMOTION CASE State: the role required; why now; three next-level examples; stakeholder evidence; the remaining risk and support plan; salary position; and the expected first twelve months.

The employee usually sees the conversation with their line manager. They do not see the comparison with other candidates, workforce plan, project pipeline, budget, diversity objectives, succession risk, geographic need or the views of leaders from previous projects.

Managers should prepare employees for this reality without presenting the process as arbitrary. Explain the categories considered, correct inaccurate information and avoid disclosing confidential comparisons. If the decision is made above you, do not pretend it was yours - but do not abandon responsibility for communicating it.

MANAGER PERSPECTIVE "I can own the quality of the case and the clarity of the feedback. I cannot promise that a calibrated process will select this person at this time." EMPLOYEE GUIDE ROUTE Refer to Employee Guide Chapters 18-20 and 44. Recommended activity: 360 evidence map.

12. Communicate Yes, Not Yet or No

The decision should be direct, respectful and connected to consequence.

A yes needs expectations and consolidation. Not yet needs evidence and review. No needs the real reason and, where appropriate, alternative paths. Avoid vague encouragement after the decision is effectively closed.

Each answer requires different content.

- 34. Yes: explain the role, authority, pay, support and first-year expectations.
- 35. Not yet: explain the decisive gaps, access to close them and review date.
- 36. No: explain whether the issue is capability, conduct, appetite, structural fit or the absence of a realistic path.

Do not soften a no into endless "not yet" if you do not believe the person can or wants to reach the role. False hope wastes time and prevents better career decisions.

*KEY TAKEAWAY Clarity can disappoint a person today while respecting their next five years.
Ambiguity often does the reverse.*

13. Discuss Title, Band, Pay and Bonus Honestly

Scope, title, band position, base pay and bonus should be named separately.

Explain what the manager knows, what is decided elsewhere and what can be advocated. Recognition cannot indefinitely substitute for remuneration where contribution has materially drifted.

These are related but distinct conversations. Scope describes the work. Title signals level. The remuneration band reflects the organisation's assessed role value, while the employee's position within it reflects experience, evidence, internal equity and market pressure. Bonus recognises or incentivises performance under a particular scheme. Mixing them allows one weak element to be defended by pointing to another.

An employee may value development but still sit in the wrong band or in the wrong position within it. A title may improve future market value without correcting the current economic position. A bonus may be welcome but cannot correct structural band misalignment. Managers should identify which problem is actually being discussed.

PRACTICAL QUESTION "Are you primarily asking for recognition, current cash, market correction, title portability, broader work or certainty about the path?" EMPLOYEE GUIDE ROUTE Refer to Employee Guide Chapters 54 and 57. Recommended activity: Banding Conversation and Total Career Value Review.

A nominal bonus can land worse than no bonus when it is presented as meaningful recognition. If it is immaterial against the employee's contribution and overall package, it may feel disconnected from the year and insulting in its scale. The line manager may not control the pool, but still owns the quality of the conversation.

Do not defend the indefensible or invent a motivational story. Explain the scheme and rating you know, acknowledge how the number is likely to land, distinguish the employee's contribution from the size of the pool and state what you escalated or can address next.

MANAGER SCRIPT "I can see why this feels disconnected from the year you had. I did not set the pool, and I will not pretend the award materially changes your package. Your performance rating was strong, and I supported that assessment. Here is how the result was determined, what I raised, and the separate band and progression discussions we still need to resolve." EMPLOYEE GUIDE ROUTE Refer to Employee Guide Chapters 54 and 57. Recommended activity: Bonus and Remuneration Conversation Preparation.

Managers frequently over-promise because they want to keep a good person calm. The promise may concern a promotion, salary, project or review date. When it fails, the employee often concludes the manager misled them even if the manager originally acted in good faith.

Divide commitments into three categories: what you decide, what you can recommend and what sits outside your control. Promise action and communication in the second and third categories, not the outcome.

PRACTICAL RULE "I will submit the case by Friday" is a promise you can keep. "You will be promoted next month" may not be.

Remuneration Conversation

Component	Current fact / authority	Next action
Role scope		

Component	Current fact / authority	Next action
Title		
Band / market position		
Base pay		
Bonus		
Review / advocate		

Commitments and Review

Use this page to convert the manual into a small number of observable commitments. A manual has no value if the reader cannot identify what will be done differently, where it will be practised and what evidence will prove the change.

Commitment	Practice ground	Evidence / reviewer	Review date

Related Buildit Manuals

- 37. 01 — The Promotion Framework
- 38. 07 — Managing Your Line Manager
- 39. 13 — Developing People While Delivering the Project
- 40. 15 — Retaining Capability in a High-Turnover Project Environment

Closing Position

A credible conversation tells the person where they stand, what changes the decision and who will do what next.

Notes
