

# Career Conversation Preparation Worksheet

This worksheet is designed to help you prepare for a productive career conversation with your manager. Strategize on what you want to accomplish, whether it is career development options you want to discuss, or if you feel you are ready for more or new responsibilities. Align your proposed objective(s) with the needs of the team, department, and University. Be open to your manager's feedback and clarify next steps to take after the meeting.

## What are my career development ideas?

Define your objective. For example, do you want to take on more duties, move to a new role, or seek a promotion? Do you have other career development ideas you want to incorporate in this conversation? If so, list them below as well.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## How will my professional development benefit the team, department, and University?

How would your proposed development help you do your current or future job better? Consider providing examples of how your proposed development aligns with the mission and strategy of your team/department/University? Would your proposed development add knowledge, a skill set, or a function your team/department does not currently possess?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Proposed implementation steps.

What actions can you take now to move toward fulfilling your objective? Are there classes or webinars you can attend, books or articles you can read, or projects you can lead or assist with that would move you toward fulfilling your objective?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Planning a Career Conversation with Your Manager Tip Sheet

You've worked hard, done good work, and now you feel you are ready to take the next step in your career. What happens next? Many employees expect their manager to notice the work they have done and give them additional duties and/or a promotion and may feel overlooked when that does not happen. This is due to one commonly overlooked fact: your career growth and development starts with you. Your manager will play an important role, but you need to take the lead in planning for your career and discussing those plans with your manager. This tip sheet identifies key considerations when you are planning your career, how to plan for a career conversation with your manager, and how to have the critical conversation.

### Prepare

#### Know Yourself

When you tell your manager you are interested in taking on new duties or a new role, you will likely be asked what exactly you would like to do. How would you answer that question? It is not enough just to want to do something different; you need to have an idea of your own desires before anyone can help you reach where you are wanting to go. Write down which duties you are passionate about and which you wouldn't mind leaving behind. You are going to want to discuss these items in your meeting. Define success for you. Is it a promotion, or perhaps a lateral change, or even just growth in your current role. Maybe you don't want to lead a team, but you would like more creative input into your department's work. These are helpful perspectives you will want to share with your manager.

#### Self-Assessment

Where do you start? The first step is to take an inventory of where you are in your career and what you are doing to prepare yourself for advancement. Make an honest assessment of yourself concerning your strengths and areas where you need development. For areas of professional improvement identify what are you doing today to learn new skills that will make you more valuable to your team, department, and employer. If you cannot identify ways you are working on your own development, you may not be entirely ready to discuss next career steps with your manager. Remember, your growth starts with you. Be prepared to discuss all of these items when you meet with your manager.

#### Seek Feedback

Your peers can help prepare you for meeting with your manager by seeking from them specific feedback on what they perceive to be your strengths and where they would recommend you seek opportunities to grow. You want to speak with peers you know are safe to talk with and who will tell you the truth.

## Make Your Business Case

Whether you are seeking to grow in your current job or hoping for an eventual promotion, this will ultimately be a business decision for your department, so make a case for how your growth will also help the team. Make sure your personal goals align with the mission of your team, department, and employer. Any future growth opportunities should be a win-win for you and for Baylor.

## Initiate

### Schedule a Meeting

When your preparation is complete, reach out and ask your manager for a meeting. Be clear when you reach out on why you are requesting the meeting. This meeting can occur at any time, but there are some considerations to keep in mind. First, this should be a separate meeting for the specific purpose to discuss your career plans. You might use your one-on-ones with your manager for follow up discussion, but that is not the best format for this more in-depth discussion. This is important to you so the meeting should focus on this one topic. Second, that also means the staff performance review is not the best place to have this conversation either, though you may consider scheduling this meeting soon after your performance review while it is fresh on you and your manager's minds. Finally, another ideal time is during the period when your department is setting individual goals for the upcoming year.

### Keep It Professional

Be sure to not bring emotions into the meeting even if you have felt frustrated in your efforts to grow. You want to find common ground for the discussion and being overly emotional will be counterproductive to your aims. Keep the conversation positive and focused on where you go from here and not be overly reflective on opportunities you may feel you have missed.

### Present Your Plan

Be prepared with notes on what you want to discuss. Consider starting by stating your primary objective of whether it is to take on more duties, move to a new role, or if you are seeking a promotion. Have clarity on what you are wanting to do next. Follow up by noting some of your accomplishments. State clearly how your strengths will serve you in the new duties and highlight ways you have addressed areas where you need development. State how your professional goals enhance and align with those of your team, department, and the University. Make it clear you are seeking your manager's feedback and would like their thoughts on what steps it might take to reach your desired goal.

### Listen

Your manager may have some immediate thoughts but may also need time to reflect before making commitments or even discussing possible next steps. It is critical in the Career Conversation to be open to your manager's feedback, even if you are not in complete agreement. Also, be prepared to answer questions your manager might raise.

### Follow-Up

Before ending the meeting, confirm the conversation can continue in your upcoming one-on-ones. Career development should be an ongoing conversation, but it is a good idea to seek agreement on future discussions.

### Follow Through

If your leadership is open to the plan you propose, or even a revised version of it, and sets specific targets for you to achieve or work on, be diligent to meet the targets and keep a log of your efforts and accomplishments.