The Promotion Campaign

Neha Batra

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- I-Signing up
- II-Campaigning
- III-Election day

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- **II-Campaigning** (writing process)
- **III-Election day** (submission)

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Make a promotion playbook

I– "Signing Up": Deciding to Promote

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High performing or ready?

- Track record
- Addition to the next level
- Consistent performance
- Confidence

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Track Record

- Technical Depth
- Technical Breadth
- Leadership and Communication
- Scope and Complexity

I-"Signing Up": Deciding to Promote

High performing or ready?

- Track record
- Addition to the next level
- Consistent performance
- Confidence
- **Who else supports?**

Track Record

- Technical Depth
- Technical Breadth
- Leadership and Communication
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Perf Review Gut Check

This is a helpful lightweight 25min exercise to do yourself or with your managers/peers to get you all in the habit of processing where your reports are tracking with respect to expectations and might help you act on certain conversations that should happen before midyear or end-of-year performance reviews.*

Implementation options: At the department level, we've chosen to do this gut check during our department's manager sync so that we can pause and reflect together at each step. As their manager and facilitator of the exercise, between each step, I'd ask "What did you notice" and "What was hard about this" to facilitate our conversations.

1. (1min) **List**: List out all your reports.
2. (5min) **Rating**: Write down the rating you would give them for the next perf review cycle if you had to do calibrations today.
3. (2min) **Confidence**: For each person, on a scale of 1 to 5, what's your confidence level in each of the ratings.
4. (5min) **Gathering**: For anyone who you rated less than a 5, who do you need to talk to to gather info to feel more confident (ex: team leads, EPD counterparts, collaborating teams, stakeholders). Additionally, for each of these people, add a placeholder in your next 1:1 agenda with them, add a to-do item to slack them, OR book a meeting to gather info. (note: ppl's memories are wiped after big breaks like Christmas Break, so book before those breaks to get the most cohesive thoughts)
5. (5min) **Opportunity***: What would you need to see before the next review period to give them a higher rating (ex: higher numerical rating or "exceeds expectation")? If you still need to gather more info, what's something you're looking to hear about to feel confident in bumping them up?*
6. (2min) **Surprise**: For each person's opportunity, do they know this is their opportunity? If the answer is "no" or "worth reiterating", add to the next 1:1's agenda you have with them. Generic rule of thumb: if you haven't talked about it in over 3 months, might we worth reiterating.
7. (5min) **Context**: Let's reverse it. Look at all the people in your org + people you collaborate with cross-org. Who do you have info or context on that you're not sure their manager knows about? Add to the next 1:1's agenda you have with that manager, book time to share, or schedule a block to provide peer feedback via your company's feedback tool. Make sure to get them that feedback before the next review cycle!

A big caveat is that sometimes there might not always be enough time before the next performance review cycle for forward-looking reflections, like Step 5 (Opportunity). Regardless, it's a useful question to process as it helps managers understand what's in their reports' control and what isn't. While it's always better to be thinking about opportunities earlier in the cycle, "now" is better than "next time".

Gathering Feedback for your Report after a Big Milestone

We rarely get feedback on individuals we manage soon after a ship; usually it's "randomly" or right before a review or promotion. A natural place in our shipping cycle to do this might be after a big ship or feature release. Here are some questions you can consider as part of it

- **Who:** The IC's line manager ("you") with folks they worked with for the milestone (consider leads, teammates, functional counterparts like product/design, and users - if it's an internally consumed tool)
- **When:** Within 2 weeks; ideally after the team retrospective if you've done one
- **Where:** Zoom is great since you can ask follow-up questions but you can offer doing it async if they prefer in writing or via a form.

My advice is to share the questions in writing ahead of time so they get a chance to think and so they don't feel scared about "what they might have to say" ahead of time.

Intro

Thanks for meeting with me! I'm meeting with you to gather some feedback about X. Over the last quarter, we've been working together on Y (something that you and your report have agreed on sharing). We've just had a big ship so it's a good time for me and X to sit down and reflect on the project but I don't have all the pieces to do that. Getting some feedback from you will help me guide them and support them in properly processing this last milestone and set good intentions for the next milestone/project that's upcoming. So I'll ask you a few questions but I want you to know that I'll be asking several people and anonymizing the feedback when I talk to X. My goal is to focus on the feedback, not on where it came from.

Questions

- What an example of an interaction that you've really enjoyed with this person?
- What do they tend to reach out to you about?
- What do you tend to reach out to them about?
- What's an example of something they've done that feels above and beyond the expectations of their role?
- What's an example of something that, had they had more coaching on, would have made this milestone easier for you?
- I've been working with them on Y. What are examples that you've seen them do this?
    - (After getting examples, follow-up:) Which of these do you feel exceeded expectations? Which could have gone better?
- What's something they could do to help the project go better?
- What's something I should be asking you but haven't asked?

Ending

Thanks for meeting with me, I learned a lot about X and what I can do to help them. I'll be consolidating your responses with others' responses on the team and anonymizing the feedback so you don't have to worry about this. It was also really nice to talk to you when we might not otherwise get to talk! Feel free to reach out to me if you have any follow-ups to what you said! My DMs are always open.

II–"Campaigning": Writing the Packet

II-"Campaigning": Writing the Packet

- Summary of their work
- Peer Statements/Referrals/Testimonials
- Other elements
  - Justification of new role
  - Shorter summary
  - Talking points

II–"Campaigning": Writing the Packet

Better Summaries

- Write with your report
- Keep your attestation to one line
- Evidence
  - Work they did
  - Link to the work
  - Impact (quantify)
  - Why it's next level
- Figure out the story
  - Themes that are impt
  - Matrix

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Better Peer Statements

- Go back to them
- Elements
  - Relationship
  - Evidence at the next level
  - What's next level
  - Explicit support ("I support this promo")
- Clarify / Refine

II–"Campaigning": Writing the Packet

Inputs

- Past reviews
- "Hype doc"
- Past ships
- People they've mentored
- Pull Requests authored
- Written Documentation
  - Discussions
  - Docs
- Sparklebot

Outputs (Better Summaries)

- Evidence
  - Work they did
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III- "Election Day": Submitting & Advocating

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- Who is the decision-maker for each level?
- What's the frequency of promotions here?
  - Off-cycle promotions?
  - What's different about the process our outcomes?
- What's changing about the process for this round?
- How does the company process "gut checks"?
- When are packets due for me?

III- "Election Day": Submitting & Advocating

- Work Backwards
- Ask for examples
- Ask your peers/mentor/sponsor

Putting it in a Playbook

1. **Early Campaign**
   - Manager consensus
   - Stakeholder informed
   - Peer support
   - Template readiness
2. **Writing**
   - Format
   - Themes
   - Solicit Statements
3. **Respond to Feedback**

When you're ready to submit someone for promotion

Playbook

>1 month before deadline

- [ ] 1. **Consensus:** Get consensus from other Communities EMs about this promotion. Bring up in EM sync. Get all yes's.
- [ ] 2. **Heads up:** During your regularly scheduled skip-level, tell them about your intention to promote and get their questions and "what they'd like to see". Have your manager bring it up to them in their regular 1:1s also. Work with your manager to see if it makes sense to bring up to your manager's peers ahead of time.
- [ ] 3. **Peer review, part 1:** Before starting promotion doc, pick your 3-5 peer reviewers. Get a soft yes that they would support this person's promotion and would be willing to put their name on the line for it; they should all or almost all be from people who are at the level they're being promoted to or above. Might want to include their product and/or design counterpart for their squad.
- [ ] 4. **Template:** Open the promotion template from step 1 of EPD Promotions Process doc.
- [ ] 5. **Reference:** Peruse through past promotion packets from the Communities department and ask your mentor or anyone you trust outside of the department for their promotion packets as reference material. Especially for the people that fit the same archetype.

>2 weeks before deadline

- [ ] 6. **Fill out:** Collaborate with your IC on the sections and get links for everything you need. Quantify when you can. Group into themes to make it more digestible. Format should be heading > quick description of work > supporting links with succinct description in the tag.
- [ ] 7. **Peer review, part 2**: As stated in step 2 of EPD Promotions Process doc, get your 3-5 peer reviews into the promo doc. If you want, you can create a separate doc for each person and give them an outline to fill out; template is here for that.

>1 week before deadline

- [ ] 8. **Get feedback, round 1**: Get feedback from me, other department EMs, and a few select people in the rest of the org (either directly or via your manager). Ideally get feedback from people like: your mentor, VPs, lead engineers, directors/staff managers, chief of staffs, etc.
- [ ] 9. **Get feedback, round 2**: Get feedback from your skip-manager and for high levels, give the decision-maker a heads up.

Day of deadline

- [ ] 10. **Submit:** Submit form according to step 3 of EPD Promotions Process doc.
- [ ] 11. **Forward:** Forward promo packet to your manager, VP, and HRBP according to step 4 of EPD Promotions Process doc.
- [ ] 12. **Confirm:** Message your VP and HRBP to make sure they got the promo doc and see it in the system. Group DM with them + your manager is fine.

After deadline

13. Steps 5 through 9 in EPD Promotions Process doc.

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- **Bias**
  - Playbooks
  - Documenting unwritten rules
  - Inserting ***trained folks*** in process

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