



THE PLAYBOOK

The Case

Building the evidence for your own progression, in a business too small to have a career framework. What to record, how to translate it, and how to ask.

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Contents

The most common reason people leave

1 Why good work does not speak for itself

2 Find out what the bar actually is

3 The evidence log

4 Translating activity into outcome

5 Asking for the conversation

6 When the answer is no

7 When the answer keeps being no

The record is the argument

The tool: the evidence log

The most common reason people leave

Across the more credible research on why people quit, one answer keeps coming first, and it is not pay.

Pew Research Center, surveying US workers who left a job in 2021, found 63 percent cited no opportunities for advancement. McKinsey, surveying more than thirteen thousand employees across six countries between February and April 2022, found lack of career development and advancement was the single most cited reason for leaving, at 41 percent, ahead of inadequate compensation at 36 percent.

Two different organisations, different methods, same finding.

In a large company there is at least a framework: levels, criteria, a review cycle. In a business of eight people there is usually nothing, and progression happens when somebody notices.

This playbook is about not waiting to be noticed. Not through self-promotion, which most people find distasteful and which works poorly anyway, but by keeping a record that makes the conversation short and evidenced.

Why good work does not speak for itself

The belief that it does is the single most expensive assumption in a career, and it is held most firmly by exactly the people it damages most.

Three reasons it is wrong, none of them about anybody being unfair.

Your manager sees a fraction of your work. They see what reaches them: the escalations, the finished artefacts, the things that went wrong. Most of what you do is invisible by design, particularly if you are good at operations, where success looks like an absence of problems.

Memory covers about two months. The same distortion that makes annual reviews unreliable applies to your contribution. Whatever you did in March is gone by November unless somebody wrote it down.

Nobody else is building your case. Your manager is managing several people and a workload. Even a good one is not maintaining a dossier on your behalf, and it is unreasonable to expect it.

A record is not self-promotion. It is compensating for the fact that nobody else is keeping one.

Find out what the bar actually is

Before recording evidence it is worth knowing what it is evidence for, and this is the step most people skip because the answer is uncomfortable to ask for.

Ask the question directly, in a one-to-one. "What would need to be true for me to be doing a bigger role in a year?" It is a reasonable question and most managers answer it honestly if it is asked calmly rather than as a challenge.

If there is no framework, ask them to describe the person rather than the level. "What does somebody who is clearly operating a level above me do differently?" Concrete, answerable, and it usually produces two or three specific behaviours.

Write down what they say and read it back. Not to be difficult. Because a spoken answer will drift and a written one is something you can both refer to in six months.

And ask what the constraint is. Sometimes it is not your performance at all: there is no budget, no headcount, or the role does not exist. That is information worth having early, and it is the difference between working harder and looking elsewhere.

The evidence log

The mechanism. Two minutes, once a fortnight, in one document that nobody else sees.

TWO WAYS TO ARRIVE AT THE CONVERSATION

Captured when it happened, each takes two minutes. Reconstructed in November, most of it is gone.

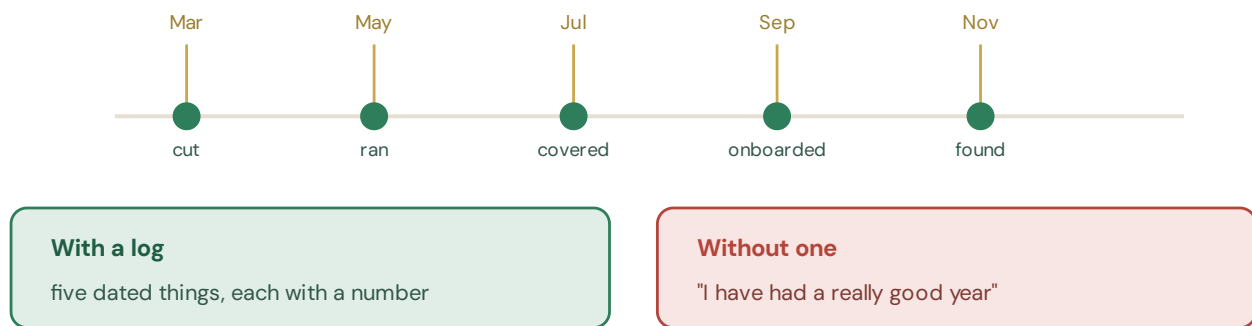


Figure: the log is not self-promotion. It is a record that exists because memory does not.

Record it when it happens, not when you need it. The whole value is that it captures what recall loses.

Four fields per entry. What the situation was, what you did, what changed as a result, and how you know. The last one is what separates a log from a diary.

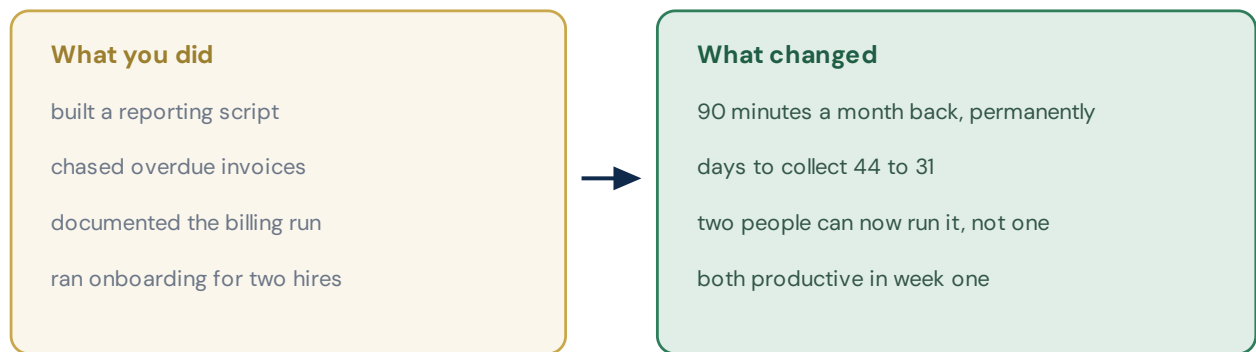
Include the things that did not work and what you changed. Counterintuitive, and it is what makes the log credible to yourself as well as usable in a conversation. A record of only successes is a document you will not quite believe when you read it back.

Capture numbers at the time, because you will not be able to reconstruct them. If a report took ninety minutes before you automated it, that figure exists only in the moment. In November it becomes "it used to take ages", which is not evidence.

Translating activity into outcome

The most common failure at the actual conversation is describing activity, which sounds like a job description rather than a case.

THE SAME WORK, DESCRIBED TWICE



The left column is a job description. The right column is a case, and it is the same work.

Figure: nobody is promoted for the left column, and almost everybody describes their year in it.

Same work, two descriptions. Nobody is promoted for the left column and almost everybody describes their year in it.

Three translation rules.

End with the change, not the task. The task is what you did; the change is why it mattered.

Use your own numbers and name where they came from. Days to collect from the ageing report. Time saved measured before and after. Small, defensible figures beat impressive vague ones, and a number somebody can check is worth ten they have to accept.

Include what stopped happening. Problems that no longer occur are the hardest thing to evidence and often the most valuable thing you did. "We have not missed a renewal since" is a real outcome.

Asking for the conversation

How to open it, which is where most people either avoid it entirely or approach it as a confrontation.

Ask for the meeting specifically. Not in a one-to-one alongside operational items. "Could we spend half an hour on my role and where it goes next?" Naming it lets them prepare, which is in your interest.

Open with the record, not the request. Here is what changed this year, four items, each with a number. You are not asking them to believe anything; you are showing them something checkable.

Then ask a specific question. Not "do you think I am ready?", which invites a judgement. "What would need to be true for this role to be a level above by the middle of next year?" invites a plan.

Ask for a decision and a date, or a condition and a date. A conversation that ends in encouragement has not ended. Encouragement is pleasant and it is not a commitment, and six months later nobody will remember it the same way.

And write down what was agreed, that day, and send it. Two lines. This is the single most useful habit in this playbook.

When the answer is no

Often it will be, and how you handle it decides whether it stays a no.

Ask what specifically would change the answer. If the response is vague, ask again in a different form: what would I need to have done by June for this to be a yes? Vagueness at this point is usually one of three things, and it is worth knowing which.

Distinguish the three types of no. A performance no means there is a gap, and it should come with specifics. A timing no means the business cannot do it yet, which is honest and dateable. A structural no means the role does not exist and is not going to, which is the most important one to hear clearly.

Get whichever it is in writing, with a date to revisit. Not as a challenge. So that in four months there is something to return to rather than a remembered impression.

And do not let a timing no become permanent by drift. "Not this year" said twice is a structural no that nobody has said out loud.

THE HONEST READ

If you have asked twice, received no specifics, and nothing has changed in a year, you have your answer. That is information rather than failure, and having it early is worth more than having it late.

When the answer keeps being no

At some point the question changes from how to progress here to whether to.

Separate the business from the manager. A small business genuinely may not have a bigger role available. That is not unfairness, it is arithmetic, and a good manager will say so plainly. A manager who cannot articulate what would change the answer is a different situation.

Consider scope instead of title. A business too small to promote you may be able to give you ownership of something genuinely larger. Scope is often available when levels are not, and scope is what actually builds the case for the next role, wherever it is.

Use the log either way. Everything in it is what you would use in an external process, and it is far better assembled contemporaneously than reconstructed under time pressure while you are also interviewing.

And if you do leave, leave on the record. Say plainly, once, that the absence of a path was the reason. Not to make a point. Because it is the most useful thing you can tell a business on the way out, and it is the thing they almost never hear.

The record is the argument

Two organisations using different methods found the same thing: the most common reason people leave is the absence of a path, ahead of pay. In a small business that path is rarely written down anywhere, and progression happens when somebody notices.

What you control is whether there is anything to notice. Ask what the bar actually is and write the answer down. Keep a log, two minutes a fortnight, with what changed and how you know.

Translate activity into outcome before the conversation rather than during it. Ask for a decision and a date rather than for encouragement.

And if the answer is no, find out which of the three kinds of no it is, because they lead to completely different next steps.

The log overleaf is deliberately plain. Its value is entirely in being filled in while things are fresh, and none of it in how it looks.

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Evidence log

Two minutes a fortnight · private · v1

Date	Situation	What I did	What changed	How I know
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Capture numbers at the time. A report that took ninety minutes before you automated it is a fact today and "it used to take ages" in six months. Include what did not work and what you changed; a record of only successes is one you will not believe when you read it back.

The last column is what makes this evidence rather than a diary. If you cannot fill it in, the entry is a task rather than an outcome.