

# WHO GETS PROMOTED AND WHY?

Coaching the 5 Key Elements  
of Promotability

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# THE 5 KEY ELEMENTS

**Self-Awareness:** How the degree to which you know yourself is directly correlated to your professional success

**External Awareness:** How to build powerful working relationships with your key stakeholders

**Strategic Thinking:** How senior management views your insightfulness, analytical skills, and ability to synthesize data from diverse sources can impact your career

**Executive Presence:** How the degree to which you can inspire confidence in others through gravitas and presentation skills establishes your credibility

**Thought Leadership:** How being respected, sought after, and well-known as an expert in your field exponentially increases your value



# The **5** Key Elements





# Self-Awareness





# External Awareness





# Strategic Thinking





# Executive Presence





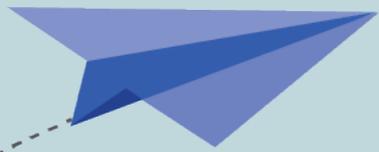
# Executive Presence

- Presentation Skills
- Gravitas
- Professional Appearance





# Implementing **The 5 Key Elements** Takes Fortitude



# Top Credit Union Uses Promotability Index Guidebook to Support Career Advancement, Communicate Expectations and Increase Employee Engagement



Sacramento Business Journal Award  
#1 BEST  
PLACE TO WORK

Industry: Banking    Product Used: Promotability Index® assessment

**Company:** SAFE Credit Union is a top 100 US-based credit union serving over 200K members, founded in 1940. Having previously earned multiple Best Places to Work designations, SAFE wanted to maintain their commitment to a culture of engaged employees.

**Challenge:** Part of its existing performance management system included a 12-month review cycle with a career development plan for all employees. Erica Dias, VP of Marketing, Communications and Community Banking was looking for a way to provide further insights for her team in 1) building out that development plan and 2) to include a path to promotability.

**How They Did It:** Dias, who holds an MBA with an emphasis in ethical leadership and is a doctoral candidate in Transformational Leadership, has a passion for developing high-performing teams. Because of her background, she understood that each member of her team would experience a unique journey across their current and future roles and could benefit by having a way to own their leadership development, with a tool that they could revisit over the lifetime of their career. With no extra cost to the process other than the time to train the team and 1:1 meetings, she quickly and easily rolled out the PI assessment to a pilot team of approximately 40 individuals. Over the course of a full year, which traversed two review periods, the team was able to adopt the program without any complications or concerns - and fit it in their very busy schedules.



## Results

Dias was pleased to learn that her hope of the PI allowing for a personalized experience was confirmed; the enthusiasm from the group validated that everyone wants to advance and develop in some way.

- 100% of participating employees welcomed the candid feedback and detailed guidance on areas where they could grow.

- 70% were interested in promotion; 30% were happy staying in their current role and gained performance insights. 100% received insight into specific actions to incorporate into their development plan.

- 60% were on track for promotion in the next 3 years

- Dias used the PI as an integral part of grooming her eventual successor

- Having a methodology and common language to work from also gave the team a more comfortable way to approach some of the tougher issues they needed to address.

# PROMOTABILITY

Today's way is about  
**AWARENESS** and  
**ACCOUNTABILITY**

*Own it, be courageous,  
then get to work!*

# TO TURN THE CLIENT'S DREAM INTO A REALITY

Understand what stage their career is in:

EXPLORING, ESTABLISHING, or ADVANCING

Identify and improve opportunity areas in  
THE 5 KEY ELEMENTS

And the client must be motivated to change those behaviors and beliefs that no longer support their success.

# HOW I CAN HELP

## Leadership Resources:

Promotability Index<sup>®</sup>: Text PROMOTEME to 44-222

*The PI Guidebook* (available wherever books are sold)

## Let's Connect!

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-  [YouTube](#) leadership shorts  
and inspirational keynotes