



"The Advancement Preparation Matrix"

Instructions: This matrix helps you systematically prepare your team for advancement opportunities before they arise, eliminating the panic and resistance that leads to hold-back behavior. Complete this for each team member to build advancement readiness rather than advancement resistance.

Part 1: Current State Assessment

For each team member, evaluate:

Role Mastery Level:

- Current role competency (1-5 scale): _____
- Time in current position: _____
- Key responsibilities they've mastered: _____
- Areas still developing in current role: _____

Advancement Readiness Indicators:

- Skills that transfer to next level: _____
- Leadership behaviors demonstrated: _____
- Initiative and innovation examples: _____
- Problem-solving capabilities shown: _____

Development Gaps for Next Level:

- Skills needed for advancement: _____
- Experience gaps to address: _____
- Leadership competencies to develop: _____
- Knowledge areas requiring growth: _____

Part 2: Advancement Timeline Mapping

Create realistic advancement projections:

Short-term (6-12 months):

- Advancement opportunities likely to arise: _____
- Internal positions they could compete for: _____
- Skills they could realistically develop: _____
- Projects that would prepare them: _____



Medium-term (1-2 years):

- Natural career progression paths: _____
- Leadership roles they could assume: _____
- Cross-functional opportunities: _____
- External advancement possibilities: _____

Long-term (2-5 years):

- Ultimate career aspirations they've shared: _____
- Leadership potential trajectory: _____
- Industry advancement possibilities: _____

Part 3: Preparation Action Planning

For each advancement scenario, plan:

Skill Development Strategy:

- Training programs to recommend: _____
- Stretch assignments to provide: _____
- Mentoring relationships to facilitate: _____
- Cross-training opportunities: _____

Experience Building:

- Projects that build advancement-relevant skills: _____
- Leadership opportunities to create: _____
- Visibility opportunities with senior leadership: _____
- Cross-departmental collaboration chances: _____

Network Development:

- Key relationships they need to build: _____
- Industry connections to facilitate: _____
- Internal advocates to introduce them to: _____
- Professional development events to recommend: _____



Part 4: Succession Readiness Building

Identify and develop multiple successors:

For each key role on your team:

Primary Successor Candidate:

- Name: _____
- Current readiness level (1-5): _____
- Development needed: _____
- Timeline to readiness: _____

Secondary Successor Candidate:

- Name: _____
- Current readiness level (1-5): _____
- Development needed: _____
- Timeline to readiness: _____

External/Backup Options:

- Internal candidates from other departments: _____
- External recruitment timeline: _____
- Temporary coverage strategies: _____

Part 5: Advancement Conversation Planning

Prepare for advancement discussions:

Key Conversation Topics:

- Career goals they've expressed: _____
- Development interests they've mentioned: _____
- Advancement timeline expectations: _____
- Support they need from you: _____

Your Advancement Support Strategy:

- How you'll advocate for their advancement: _____
- Connections you'll make on their behalf: _____
- Recommendations you'll provide: _____
- Resources you'll share: _____



Transition Planning:

- Knowledge transfer requirements: _____
- Handoff timeline for smooth transition: _____
- Interim coverage during transition: _____

Part 6: Progress Tracking System

Monitor advancement preparation monthly:

Development Progress:

- Skills improved this month: _____
- Projects completed building advancement readiness: _____
- Leadership opportunities provided: _____
- Networks connections facilitated: _____

Readiness Indicators:

- Advancement conversations initiated: _____
- External interest they've mentioned: _____
- Readiness level changes: _____
- Timeline adjustments needed: _____

Your Preparation Status:

- Succession candidates developed: _____
- Replacement readiness improved: _____
- Advancement advocacy actions taken: _____
- Fear/resistance level about their advancement (1-5): _____

Part 7: The Advancement Opportunity Response Plan

When advancement opportunities arise:

Immediate Response (24 hours):

1. Review their matrix assessment
2. Confirm their interest and readiness
3. Identify support needed
4. Begin advocacy actions

**Support Actions (Week 1):**

1. Provide strong recommendation
2. Connect them with decision makers
3. Share relevant opportunities
4. Offer transition planning assistance

Transition Planning (Ongoing):

1. Activate succession candidate development
2. Plan knowledge transfer process
3. Celebrate their advancement publicly
4. Maintain relationship for future collaboration

Closing Framework: When you systematically prepare your team for advancement, you eliminate the fear that drives hold-back behavior. Employees with advancement opportunities within their second year are 75% likely to stay versus 56% who don't advance. Your matrix ensures you're ready to say "yes" to advancement because you've planned for success rather than hoping for stagnation.

Monthly Review Question: Are you preparing your team for advancement or hoping they'll never want it?