

Guide: Promotion Requests

What this is

As part of your performance review cycle, you are likely to receive requests from managers or employees to be considered for promotion. This guide/template will help you assess and approve/deny requests consistently.

Why this matters

In a smaller company, leadership has direct visibility to individual performance. As the company scales, management has more visibility into individual readiness while leadership has more visibility into budgets and business needs. This form is a simple way of aligning the two and using a consistent assessment method to avoid perceptions of bias or discrimination.

Who

Managers are responsible for completing the promotion request, outlining their objective performance observations and perceptions of business need.

Who should approve/deny the request: To build for scale, best practice is to have at a minimum 2 approvers. Typically someone with direct management of the budget (founder, finance) and another with oversight into org. Design and business growth (functional leader, people).

When/ how often should promotions happen: You will notice promotion windows tend to follow your performance cycles. Some companies choose to allow promotions any time when others prefer to limit to 1-2x windows a year to help with budgeting and calibration alignment. When you are <50 employees and growing, we recommend keeping the flexibility of anytime promotions or quarterly windows. At 100+ employees, you will need to consider an internal mobility process that integrates with your chosen promotion process. Once you implement calibration, promotion windows typically move to 1-2x annually following calibration, with exceptions built in to allow for anytime business need driven internal mobility.

How to use this template: [Make a copy of this form and update as needed](#). Utilizing a form vs. a word document will allow for easy approval flows, tracking, referencing past decisions and reporting. Once you decide on the “approvers”, you can simply install the below form notifications add-on to ensure approvers get an email notification each time a submission comes in.



Form Notifications

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By: google.com

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Overview

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