

# Internal Advocacy: How to Get Credit Without Bragging

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## Episode 19 Companion Download

This companion download gives you a practical framework for documenting your impact, communicating your wins, and positioning yourself for career growth. Use this template to build a systematic practice of internal advocacy that serves you throughout your career.

What you'll find in this guide:

- Your Impact Log template for weekly documentation
- Monthly summary framework for manager updates
- Quarterly review checklist for career development conversations
- Do's and Don'ts for effective internal advocacy

## Your Impact Log Template

Use this structure to capture your wins every Friday. Block 15 minutes on your calendar and make it recurring. The key is consistency - log your wins in real time so you don't forget them.

### What to Track

- **Date:** When the work happened or completed
- **Customer/Account:** Which customer or account this involved
- **Action Taken:** What you did (be specific but concise)
- **Business Impact:** The measurable outcome or result

### Impact Log

Copy this table into a Google Doc and update it weekly:

| Date          | Customer | Action Taken                                                                 | Business Impact               |
|---------------|----------|------------------------------------------------------------------------------|-------------------------------|
| Feb. 17, 2026 | ABC Corp | Ran EBR with CISO and VP of IT. Secured commitment to expand deployment.     | \$85K ARR expansion confirmed |
| Feb. 24, 2026 | XYZ Co.  | Closed expansion after 3 months of exec engagement and technical validation. | \$47K ARR growth              |
|               |          |                                                                              |                               |
|               |          |                                                                              |                               |

*Pro Tip: Don't just log the big wins. Log the invisible work too - the escalation you prevented, the internal alignment you built, the customer you pulled back from the edge.*

## Monthly Summary Framework

Once a month, send your manager a concise update. Keep it to 3-5 wins maximum. Structure your summary around outcomes, not activities.

### Email Template

**Subject:** [Your Name] - [Month] Update

Hi [Manager Name],

Quick summary of this month's key outcomes:

1. [Outcome-focused win with specific customer and dollar impact]  
*Example: Closed \$85K expansion with Lowe's after six months of executive engagement and strategic EBR positioning.*
2. [Second win]
3. [Third win]

Let me know if you'd like more detail on any of these.

[Your Name]

*Remember: Frame everything around business impact. "Closed renewal" becomes "Secured \$200K renewal after executing 90-day recovery plan."*

## Quarterly Review Checklist

Every quarter, have a sit-down conversation with your manager about performance and career development. Here's how to prepare:

### Before the Meeting

- Review your Impact Log and pull 5-7 most significant wins from the quarter
- Write a one-page summary connecting those wins to business outcomes
- Identify 2-3 areas where you want feedback or development support
- Prepare specific questions about career growth and next-level skills

### During the Meeting

- Lead with outcomes: "Here are the three biggest impacts I had this quarter..."
- Connect your wins to team/company goals: "This directly supported our Q2 retention target"
- Ask for feedback: "What should I be focusing on next quarter?"
- Discuss career development: "What skills do I need for a senior role?"
- Document action items and follow up within one week

*Make this a dialogue, not a presentation. You're building a partnership, not delivering a performance review.*

## Internal Advocacy: Do's and Don'ts

### Do's

- ✓ Document your wins in real time (weekly Impact Log updates)
- ✓ Frame contributions around business outcomes, not task completion
- ✓ Share your impact in context that adds value to team conversations
- ✓ Give credit to teammates and collaborators for shared wins
- ✓ Turn individual wins into reusable frameworks that help the entire team
- ✓ Elevate your teammates by highlighting their wins in team meetings
- ✓ Use quarterly reviews as career development conversations, not just performance reports

### Don'ts

- X Wait until annual review to start documenting your impact
- X Take sole credit for collaborative wins (leadership will see through this)
- X Badmouth colleagues or throw previous CSMs under the bus
- X Overwhelm your manager with 20-point weekly updates
- X Name-drop customers in meetings just to sound important
- X Frame problem-solving as “fixing someone else's mess”
- X Advocate only for yourself without elevating the CS function

## Your Action Plan

Internal advocacy isn't about ego. It's about making sure the people who influence your career have the information they need to support you. Here's how to start:

### This Week:

- Create your Impact Log (use the template above)
- Block 15 minutes every Friday for weekly updates
- Make it recurring and protect that time

### This Month:

- Send your manager a summary of your top 3 wins
- Frame them around business outcomes
- Ask for feedback on priorities for next month

### This Quarter:

- Schedule a career development conversation with your manager
- Review your Impact Log and pull 5-7 key wins
- Ask about skills needed for advancement

***Your career deserves the same attention you give to your accounts.***

## Next Steps and Resources

This guide is part of The CSM Career Ladder mini-series on ClearPath Conversations:

- **Episode 18:** The CSM to Team Lead Transition
- **Episode 19:** Internal Advocacy: How to Get Credit Without Bragging
- **Episode 20:** How to Handle Burnout in CS

Additional Resources:

- *ClearPath CX Website:* Templates, frameworks, and resources at [ClearPathCX.com](https://clearpathcx.com)
- *LinkedIn:* Connect with Mark at [linkedin.com/in/markbernardin](https://www.linkedin.com/in/markbernardin)