

A woman with long dark hair, wearing a bright yellow textured sweater, is sitting at a white desk. She is looking towards the camera with a slight smile. Her hands are clasped together on the desk. To her right is an open laptop displaying a website. In the foreground, there is a white computer mouse and a blue pen. The background is a blurred office environment.

# MAKE YOUR CASE:

## How to Keep an Accomplishments Portfolio



**BEYOND B-SCHOOL**

Online Career Training for MBAs

# MAKE YOUR CASE: How to Keep an Accomplishments Portfolio

Imagine that you've just walked into your next salary negotiation meeting. You've been at this job for two years now, and you feel that you've definitely earned a raise.

But when your boss says, **"Can you share some examples of how you've gone above and beyond the job description?"**, your mind goes blank.



Not surprisingly, your request is turned down.

Now, imagine the same scenario—except you've shown up with a binder filled with your most impressive accomplishments, milestones, positive feedback, and insights from the past 24 months.

Your boss's eyes widen as she flips through the pages.

**"Oh yeah, I forgot you did that,"** she murmurs to herself.



Not surprisingly, your request is granted.

Keeping a portfolio of your career growth can (literally) pay off. And it's not just important during salary negotiations: it's also a crucial tool for performance reviews and job interviews. Read on to learn what belongs in your portfolio, how you should organize it, and the right way to present it during these meetings.



*Sure, you could start from scratch—but we're guessing you already have plenty of files and work samples worthy of inclusion.*

### Email

Written correspondence helps you prove other people's good opinion of you. First, search through your archives for anything nice your boss has said.

For example, if you turned in a report, and your supervisor responded, "Great work—and thanks for getting this in early, I really appreciate it!" that would be a fantastic email to include in your portfolio.

More general emails work as well. Maybe he said, "Since you always present so well, I'd like you to give the run-down at tomorrow's session."

After you've found examples from your boss, look through your email for praise from your co-workers. Even though it might seem odd to include nice things your peers have said, doing so will show that you're respected by your colleagues and can work well in a team.

Let's say a team member in another department asked for your expertise on a project. After you helped him, he sent you a message to say, "Couldn't have done this without you, thanks so much!" That would definitely be great to put in your portfolio.

Client emails are also excellent examples of your work ethic and reputation. Again, you're looking for positive feedback!

### Projects

We recommend including the biggest and most notable projects you've contributed to over the past year or so. Create a summary page for each, listing how long you worked on the project, your primary role, who else was involved, the results, the main skills you used, and the new skills you picked up (if applicable).

If you've got any other project documents—press releases, company newsletters, team-wide updates from your boss—include those as well.

### Professional Education

Anything that displays your continual career growth should be added to your portfolio as well. If you've received a certification or taken a course (whether at work or independently), find the file documenting your graduation.

You can also document "unofficial" education. For example, maybe your boss taught you the basics of search engine optimization (SEO). Write up a short brief explaining your SEO knowledge and a couple ways you've used it in your job.

### Miscellaneous

Any awards you've won should absolutely be included in your portfolio. (Just make sure they're rel-

atively recent and work-related—no one will care about the prize you won playing hockey in college.)

If you've got any work samples of which you're particularly proud (say, a really well-written report or a comprehensive proposal), those would be appropriate too.

### Academia

Even those who have never had a legitimate 9-5 job can put together a portfolio. Start by collecting your transcripts, recommendation letters, evidence of extracurricular activities, prizes, scholarship documents, and so on. If you've completed an internship, include a half-page overview of the position, the industry and company, what you learned, and what you accomplished, along with any emails praising your work that you might've gotten from your internship supervisor.



*There are two basic ways to compile your portfolio. You can take the low-tech route and collect everything in a binder or folder, or you can digitize all your materials and store them on your computer.*

*The second system—although more time-intensive—is preferable. It's pretty easy to misplace a physical binder or folder, but you'll never lose or damage the virtual version. Plus, the majority of your materials will already be online, whether they're emails, reports, documents, etc.*

### Uploading

Thanks to modern technology, digitizing any physical materials you may have is nearly effortless. You could use a scanner—but using your smartphone is even easier. Just snap a picture of the documents you want to upload and use an app like CamScanner or To PDF to convert them into PDF files.

Save anything that's already online by taking a screen-shot of it.

### Storing

So, the next question is: How do I store and share my portfolio?

Luckily, you have a wide variety of tools to choose from.

Dropbox is an easy, secure, and free platform. Create a "Portfolio" folder and upload your files—you can even create sub-folders, such as "New Skills 2016" or "January - September Milestones." If you'd rather use a different platform, Google Drive and Microsoft OneDrive are great options as well.

### Order

You've got some discretion in how you actually arrange the files themselves. One option is to group your materials in chronological order, from most recent to oldest. Go with this method if you've clearly grown over time, so that your most glowing praise, best praise, and biggest achievements are at (or very close to) the beginning.

Alternatively, put your most impressive materials at the front. Maybe the first document is an email you got a year ago from your boss's boss saying you did a fantastic job on a project, while a certificate you earned three months ago is in the middle and a nice note from your

coworker is toward the end. This organizational system is ideal if you've got a lot of material and you want to focus your audience's attention on certain components.

You can also organize by type, i.e. awards, then emails, then project briefs, and so forth. When all of your materials all into three or four categories, this approach makes a lot of sense.

## STEP





*After you pull together all of these materials, you should have a pretty solid base for your portfolio. Now you can start actively looking for new things to add.*

*There are tons of different ways to do this, so it's up to you to find which one suits your style best.*

### **The Daily Report**

Tracking your wins every day not only keeps you focused and motivated, but it also ensures you never miss an opportunity to add materials to your portfolio.

Day One is a beautiful iOS journaling app that enables you to write a brief update each night. You can export entries as PDFs, so they could easily be added to your online portfolio. Or, simply use Day One as a progress-tracker; after every couple weeks or so, you could review your entries, pick out the most significant wins, and find materials that represent them. Vesper is a similar option.

Trello is a great tool for recording achievements as well. Basically, you create

online bulletin boards (or “boards”) onto which you pin Post-it notes (“cards”). Some people track their victories with a “Wins” board and cards for “Client Feedback,” “Skills Learned,” “Processes Implemented,” etc.

### **Email**

We advise that everyone create an email folder titled “Wins,” “Accomplishments,” or something along those lines. Every time your boss, co-worker, or client gives you good feedback or shares positive results, send that message to the Wins folder.

At the end of every month, go through and select the most impactful emails; then, screen-shot them and add them to your portfolio.

### **Miscellaneous**

Of course, every time you get an award, certificate, honor, and so forth, you should immediately make a copy for your records.

Also, don't forget to create project briefs for any projects you're especially proud of.

You might be wondering how to document positive verbal feedback. If the person who complimented you is a relative stranger, we suggest sending them an email saying, “Thanks so much for saying (compliment) today—I really appreciated your kind words!”

They'll respond with something along the lines of, “You're welcome, it was my pleasure.” They may even repeat or reinforce their ear-

lier praise. In any case, now you've got a written record of the feedback, so screen-shot this exchange and add it to your portfolio.

If you're pretty familiar with the person (they're your boss, coworker, or long-time professional connection), then go ahead and ask them for a written version of their comment. Send them an email saying, “I was so happy to hear (compliment)—in fact, I'd love to add it my work portfolio. Would you mind writing out your feedback so I can upload it?”



### Applying for a Job

Most people show up to a job interview armed only with their resume. If you can bring literal proof of your skills, you'll both stand out and impress the hiring manager.

First, go through your materials and pick out the most relevant files. For example, if you're applying for a job in public relations, it would obviously make sense to include a press release that you wrote up. But the work samples you have from your internship at Wells Fargo should be left out—after all, the knowledge you acquired in that internship probably won't directly apply to this position.

Next, print out the documents you've chosen and organize them in a three-ring binder. It's a great idea to also include a "Table of Contents" page so that the interviewer can get a quick overview of what you've put in.

After you shake hands, hand him or her your portfolio and say, "I've brought along some examples of my work from the past X years."

Refer to the materials in the book throughout your interview. For example, if the hiring manager asks about a time you demonstrated leadership, you might say, "When I was handling X project—which you can find in my portfolio, then..."

Or let's say he or she asks, "How familiar are you with Y software?" Reply, "I've worked extensively with that program—in fact, you can find an example on page 12 of my portfolio."

With this technique, your interviewer will get a really clear idea of your potential.

### Negotiating for a Raise

Employers actually expect you to show up with written materials when you're trying to get a salary increase.

Like with an interview, you should browse through the files you've saved and choose the most pertinent ones. You should specifically be looking for examples of the ways you've saved the company money, increased its reputation, satisfied its customers, or made it more efficient.

The number of documents you need will vary depending on how long you've worked there. If you've only been an employee for one year, you're naturally going to have less to show than if you've been there two or three.

Same process as above: Print your files, put them in a binder, and bring them to your meeting.

We advise giving them to your boss and saying, "I've put together a collection of my work from the past X years. I feel this work really shows the value I've added to (company name)."

Then say, "Some of the highlights include..." Describe three or four of your biggest wins.

Next, describe how your responsibilities have grown or become more complex. To give you an idea, you could say, "For the last four months, I've been the primary liaison between the main office and the California branch. This relationship has been going really smoothly. In addition..."

Wrap up your ask with, “I’d love to discuss a salary adjustment to reflect my increased contributions to the company.”

### **Having a Performance Review**

In many ways, sitting down with your manager to discuss your performance feels like sitting down with your manager to discuss a potential raise.

The prep process is (largely) the same. Curate the files that show how you’ve promoted the company’s overall mission, print them out, and put them in a binder.

However, don’t wait till the actual review to share these materials with your boss. You want to give them plenty of time to look them over so you can have as productive a conversation as possible.

And what should you say during that conversation? Well, your boss will probably take the lead: Expect them to summarize your growth, strongest work, areas for improvement, and future milestones. Your boss will likely refer to the examples you cited in your book—and if they mention projects or achievements you didn’t include, make a note so you can add those later (since they clearly made an impression on your boss).

### **Further Uses**

If you also want to make your portfolio visual, consider creating a website on WordPress, Weebly, PortfolioBox, or Wix. You’ll need to invest some time and creative energy into this endeavor, but your efforts will be rewarded by an impressive end product.

Squarespace is an easy-to-use website builder that makes it simple to design a professional-looking portfolio. However, unlike the other tools mentioned, it’s not free—the basic version costs \$72 for a year-long subscription, or \$12 per month.

Since you’ll probably have some sensitive information in your portfolio (at least, information you don’t want the whole world being able to see), turn on the password protection feature. All of these options (except Dropbox, Google Drive, and OneDrive, which are private by default), let you create a password “wall.”

You can also make confidential information safe to share by blurring out identifying words on files. Maybe you have an email from a client thanking you for the fantastic overhaul you did of their HR program. Protect their privacy by blurring out their name, email address, email signature, company name, and so forth.

You can also describe wins in generic, rather than specific, terms.

Let’s say that in your original file, you write, “Increased revenue from Pacific Northwest region by 45% after introducing new product line targeting women age 24-29.”

In your online version, you might say, “Increased regional revenue dramatically by launching new product.”



In summary, here's what you need to do:



Collect the materials you already have



Organize them and choose a storage system



Continually update and add to your portfolio



Look for opportunities to use it