

how to

Fill a Role Internally

A step-by-step guide to ensuring the internal process for filling roles is thorough, leads you to the best candidate, and manages risk.

Intro

When you have a role open on your team that you are opening to internal candidates, there are specific steps to take in order to ensure greater success.

Done incorrectly, you can unintentionally demotivate high performers and create chaos or frustration within the overall team. This process also can bring about unintended risk for the company if done poorly namely discrimination claims. You want your process to be fair and well documented to support the decisions made.

Using this Guide

This is meant to be a high-level overview of the process. The steps described will get you headed in the right direction. As you go through the guide, you'll see buttons that link to additional resources specific to the topic.

[CLICK ON THESE FOR ADDITIONAL TRAININGS](#)

Challenge Yourself

Great managers focus on the fundamentals day in and day out. They have intentional processes that are designed to support their team members. Processes may not be the most exciting thing, but they make a big impact. The lack of process is where the biggest mistakes wind up happening.

The Process

ROLE EXPECTATIONS

At the start, the role's scope needs to be clearly defined. What are the requirements of the role and how success is going to be measured? This exercise results in a well written job description (JD) that will be the main document used for the remainder of the process.

TIPS ON WRITING A STRONG JD

COMPENSATION

Once you have the JD completed, it's time to understand how much you will pay this role and how.

HOW MUCH

Your company may have salary bands established based on level. However, it's always good to benchmark your role against the current market. Manager Material's recommended benchmarking tool is Payscale. Benchmarking allows you to ensure what you are wanting in terms of talent matches the budget given. If the don't align, you might need to get a bigger budget or reduce the scope of the role.

STRUCTURE

Will it be hourly? Will it have commission or bonuses? If so, how often will those be "earned" and "paid"? (States like California require both to be addressed for commissions) Overall, the structure is highly dependent on the scope of the role.

INTERVIEW LOOP

Now it's time to create a strategy for how the interview process will go:

- What type of interviews do you want to include?
- Who will be doing the interviewing?
- What topics will each interviewer cover?
- How will the feedback be documented and discussed?

The JD you created will be the base for answering these questions. The goal is to design an interview loop that will be the most effective way to figuring out if someone meets the bar or not to perform in the role.

YOU'LL WANT TO PARTNER WITH RECRUITING ON THIS STEP (IF APPLICABLE)

INTERVIEWS

Once you have your interview loop strategy in place and all participants are aware of their roles, it's time to post the role for applicants and move through the interview process. Keep in mind that you aren't picking the best of the candidates, you are measuring each candidate against a bar of whether or not they will perform in the role.

Each candidate will have risk. The best interviewers can effectively find that risk and then determine if it is manageable or not.

A good sign of effective interviewing is detailed, on topic feedback from each interviewer that has not been influenced by others in the process.

COURSE: BECOMING AN EFFECTIVE INTERVIEWER

THE OFFER

When you have made a decision on a candidate, it is now time to have a transition or promotion letter drafted. This might be done through a PAF in your company's HRIS or might be a digital or physical letter that needs to be signed. The document needs to cover things like the title, pay, pay cycle, FLSA classification, and where the role is based. Letters might include additional agreements and need to follow local, state/regional, and federal law. Always double check the document before it is presented to the candidate.

YOU'LL WANT TO PARTNER WITH HR OR LEGAL ON THIS STEP

COMMUNICATION

This is an area where managers often go off track. In order to prevent things from going sideways, here are the communication steps we recommend:

- Loop in any other managers impacted by this - maybe a candidate works in a different part of the company or for a manager that reports to you.
- Present the offer to the candidate - you need to know if they will accept before moving to the next step
- Communicate to other candidates - be sure to do this privately and not in a group email or other public channel
- Communicate to the rest of the team - you want to loop the rest of the team in who is getting this position. Doing so reduces the risk of incorrect narratives/rumors to gain traction.

OTHER CANDIDATES

This is a step that often does not happen but is one of the most critical steps to prevent your high performers from losing motivation. The candidates who interviewed but did not get the role need a conversation about why they didn't get it and have a development plan to guide them for the future. This demonstrates respect, provides clarity, and reinforces that their growth is important to leadership. Too often internal candidates are left with unanswered questions. In those situations, it is incredibly common for incorrect and often damaging reasons to be created. If a candidate works for a manager other than you, partner with that manager, so they are in the loop on the why and the areas that need development.

TRANSITION

It is rare the team member filling the open role immediately moves from their current position. If they are needed in their current role for a period of time before moving, a transition plan needs to be established. This includes what is expected of the person in handing off their current role and the expected timeline.

NEW ROLE PLAN

For the new role the team member will be moving into, a ramp plan will need to be established just like you would for a new hire. This is a change for the team member, so they will need more frequent communication and clear guidance on what is expected of them during at least the first 90 days.

HOW TO: TRANSITION + RAMP PLANNING

Hi!

I'm Erin!

I develop people managers. I'm so excited you are investing in yourself, your career, and in being a more effective manager for your team. You are one of the few managers (32% of people don't have effective managers according to Gallup) taking managing people seriously. I'm really proud of you for that!

Being a people manager can feel overwhelming and lonely at times. In an ideal world, you would have someone like me in your company to walk alongside you. But I know that's not always the case, so I'm really glad we found each other! Let's turn you into a confident, highly successful manager of people!

Make sure to check out everything Manager Material has to guide you on your development journey!



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