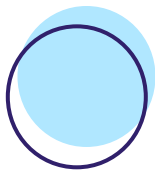


Resource Library

# Promotion Playbook



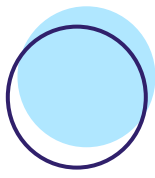


**Effective promotion management is a cornerstone of talent development and workforce retention. It's a crucial process that directly impacts organizational culture and the employee experience, and therefore, requires strategic thinking, transparency, and fairness.** In this playbook, you will find an exploration of best practices for managing promotions, offering valuable insights and practical advice.

By following these guidelines and utilizing the provided checklist, you can build a robust and creative promotion process that aligns with your organization's goals, fosters employee development, and ultimately contributes to the success and growth of your organization.

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## 1. DEFINE PROMOTION CRITERIA

Setting clear promotion criteria is fundamental to a transparent and effective process. Criteria should be aligned with job requirements and organizational objectives and can, therefore, vary widely from role to role. They should also align with your talent philosophy as well as your talent management strategy. Establishing clear and measurable metrics not only provides employees with a roadmap for success but also ensures that promotion decisions are based on objective criteria rather than vague impressions.

Below are some criteria you might consider:

-  **Skills:** The employee should possess a skill set that matches the requirements necessary for success in the new role.
-  **Performance:** Consistently achieving high performance over an extended period may warrant recognition, reward, or promotion.
-  **Career alignment:** Each position should have a well-defined career growth path within the promotion policy.
-  **Seniority:** Employees with greater tenure may be eligible for promotion based on their extensive knowledge of the company and their commitment.
-  **Potential:** Consider an employee's potential to excel in a more senior role or to develop a higher level of technical expertise.
-  **Motivation:** Assess the employee's motivation and willingness to embrace new responsibilities, their attitude towards work, and their alignment with the company's culture.

### TIP!

If a software company values innovation, the criteria for a promotion might extend beyond technical skills to include idea-generation abilities and an innovation mindset. Alternatively, if you are promoting an employee to a leadership position, you might require skills in team management, decision-making, and conflict resolution.



## 2. COMMUNICATE THE PROMOTION GUIDELINES CLEARLY

Fostering trust and morale among employees hinges on transparent communication throughout the promotion process. It's imperative to offer feedback to all candidates, whether their promotion is successful or not, emphasizing open and honest dialogue as a fundamental principle. This entails informing employees about promotion opportunities, providing constructive feedback, and sharing outcomes to reinforce the integrity of the decision-making process.

Incorporating development-focused conversations is essential. Initiate candid discussions with potential candidates to explore their career aspirations, assess their readiness for new challenges, and discuss the additional responsibilities that accompany a promotion. These conversations empower employees to comprehend their roles and set meaningful goals.

Furthermore, clarity is of utmost importance during this phase. Clearly define the new job title, responsibilities, and any associated changes in compensation to ensure a comprehensive understanding of what the promotion entails and to manage expectations for a seamless transition.



## 3. IDENTIFY QUALIFIED CANDIDATES

Identifying qualified candidates involves assessing employees against the defined criteria. When considering employees for promotion, recognizing potential goes beyond evaluating their current roles. It's about understanding their capabilities, growth trajectory, and alignment with the company's goals. This step should also support and enable the execution of your talent management strategy as well as the career enablement practices of your organization.

Begin by assessing an employee's performance in terms of meeting job responsibilities and their dedication to their role. Evaluate their skill set, encompassing both technical and soft skills. Consider how these skills contribute to both their current role and the organization at large. A well-rounded skillset ensures their preparedness for more demanding positions and their ability to enhance team dynamics.

Internal candidates often bring a deeper understanding of the company's culture, values, and operations. However, there may be instances when you are unable to find a suitable fit internally, in which case you can consider external hires.

### TIP!

Performance reviews can serve as a critical tool to assess employees based on the promotion criteria. For technical roles, you might also conduct skill assessments or analyze previous project work to gauge competence. Some HR tools provide a great way to keep track of employees' skills, experiences, interests, and past performance.



#### 4. ENSURE EQUAL OPPORTUNITY

Promoting a bias-free and inclusive environment is paramount to ensuring that the promotion process offers equal opportunities to all employees. It is crucial for a promotion policy to provide an equitable chance for advancement while eliminating any traces of gender or ethnic discrimination, as well as nepotism. By affording each employee a fair shot at success, an organization demonstrates a commitment to transparency and motivates employees to actively pursue upward mobility. Including anti-discrimination clauses in the policy underlines the organization's dedication to diversity, equity, and inclusion.

##### TIP!

To support and empower your managers in making less biased promotion decisions, consider providing them with training on recognizing and counteracting bias.



#### 5. EVALUATE AND DECIDE

Promotion decisions should be underpinned by a structured process, possibly involving a committee, to uphold consistency and fairness. This committee should collaboratively review candidate assessments and make decisions informed by diverse perspectives. The composition of a promotion committee might vary depending on your organizational context; however, it's usually composed of a committee lead, another leader, and an HR professional.

It's important to maintain transparency by thoroughly documenting the rationale behind each promotion decision.



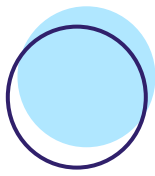
#### 6. IMPLEMENT THE PROMOTION

Once the decision is made, the promotion should be implemented clearly and transparently. This process involves ensuring a smooth transition for the employee into their new role, which includes equipping them with the necessary resources and support to excel. Regular performance reviews and tailored training should be conducted to set the promoted employee up for success.

For effective communication of promotion decisions, it's vital to announce not only the promotion itself but also the new job title and the reasoning behind the choice. This recognition of the employee's journey and accomplishments not only celebrates their success but also inspires others.

Implement the necessary changes in payroll, job titles, and benefits to match the requirements of the new position. Align the salary with the pay scale of the new role and ensure that benefits packages are consistent with the promotion.

Lastly, it's important to monitor the employee's performance and growth after the promotion. This ongoing support includes providing opportunities for skill development, offering guidance, and recognizing their achievements, showcasing the organization's commitment to their career advancement.



# Upgrade Your Promotion Culture

**Below are some additional practices that can contribute to a positive promotion culture.** While these practices go beyond the promotion process, they significantly influence how employees prepare for and perceive promotions.



**Communicate advancement paths:** Clearly communicate the trajectories for professional growth within the organization. When employees have a transparent view of the various developmental stages and the required skills at each level, they become more inspired to align their efforts with the company's long-term vision.



**Nurture a learning culture:** Foster a mindset of continuous learning by encouraging employees to embrace ongoing education. When learning becomes ingrained in the company's culture, employees are more inclined to actively pursue new skills and knowledge in line with their career aspirations.



**Create more opportunities for feedback:** Introducing specific performance assessments, acknowledgment of achievements, and guidance on areas needing improvement play a pivotal role in nurturing employee development.



**Encourage project leadership and cross-functional collaboration:** Encourage employees to assume leadership roles on projects and engage in collaborative efforts across departments. These experiences expose them to fresh challenges, broaden their skill sets, and prepare them for roles with greater responsibilities.



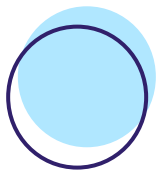
**Expose employees to new challenges:** Present employees with opportunities that stretch their capabilities. Assigning tasks that take them out of their comfort zones can foster growth and resilience, which can contribute to future promotions.



**Evaluate the promotion process's effectiveness:** You can consider metrics such as internal vs. external ratios for filling roles, the number of promotions, a decrease in turnover, among others.



**Implement an appeals process:** Establish a transparent procedure for employees who believe they were unjustly denied a promotion. An appeals process provides a mechanism for addressing concerns and rectifying any errors in judgment, thereby enhancing the credibility of the promotion policy.



**In order to create a positive promotion culture, it can be worthwhile to establish some promotion principles and communicate them to the broader organization.** Below are just six possible values to inspire you; however, you can assemble a set that better suits your own context and company.



## Objectivity

Promotion decisions will be rooted in objective and regular evaluations, with documented achievements and areas for improvement.

## Meritocracy

Promotions will be based on demonstrated skills, performance, and qualifications rather than favoritism or bias.

## Consistency

Promotion policies will be applied consistently across departments and positions to ensure a fair process.

## Transparency

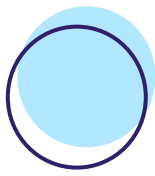
The promotion process and criteria will be communicated to all employees to ensure fairness and understanding.

## Mobility

Employees will be given opportunities for growth and development to enhance their skills and readiness for promotion.

## Equality

Promotions will be free from discrimination based on gender, race, age, sexual orientation, disability, or any other protected characteristic.



**Use the checklist below as a tool to navigate any forthcoming promotion cycles, guaranteeing the implementation of a robust and comprehensive process.** By introducing a clear, transparent, and fair process, you can empower the managers in your organization to make informed decisions.

YES NO

## CRITERIA

Were promotion criteria defined and aligned with the job requirements?

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## ASSESSMENT

Were all eligible candidates fairly and consistently assessed?

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## TRANSPARENCY

Was the promotion process communicated transparently to all employees?

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## DOCUMENTATION

Is the rationale behind promotion decisions clearly documented?

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## LEGAL COMPLIANCE

Does the promotion process adhere to legal requirements?

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## PAYROLL AND HRIS

Were payroll and HRIS changes accurately implemented?

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## TRAINING

Have promoted employees received the necessary training and resources?

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## MONITORING

Is there a system in place to continuously monitor and evaluate promotions?