

The Role Advice Process

In traditional organizations, roles are crafted around tactical performance. They are seen as a set of specific tasks that we need to take on, and our success depends on how well and how fast we can execute them. This approach usually leads to a problematic relationship with work and collaboration because it makes us see our jobs as something completely separate from our personal lives. But what if there was a way to design roles based not only on the company's needs and expectations but on our interests, strengths, and growth? Wouldn't that make us feel more engaged and inspire us to do our greatest work?

According to Neel Doshi and Lindsay McGregor's book [*Primed to Perform*](#), the practice that increases employee motivation the most—[up to 87%](#)—is none other than role design. Based on that research, the Ian Martin Group created the Role Advice Process (RAP). This tool, as its name implies, allows us to rethink our roles using advice from our colleagues. Here's a quick guide on how the RAP works and the part the advisor plays.

If you are considering going through this process yourself or are a manager looking to understand it, read:

- [RAP: Step by Step - The Explorer](#)
- [RAP: Step by Step - The Manager](#)
- [RAP: Step by Step - The Manager \(The Basics\)](#)

Role Advice Process: Step by Step

The Advisor

People often find themselves in jobs that do not match their skills, interests, or expectations. Through a Role Advice Process, a person can reconsider their role, the tasks it involves, and their fit to the organization's current needs. For the advisor, a RAP is an opportunity to contribute to that person's exploration of their role, motivation, and decision-making through feedback.

If you're reading this document, you probably were chosen by someone that deeply values your perspective and experience, or maybe you volunteered to help both a colleague and the whole team. This is the context you need to understand what the other team member will go through and the ideal way to offer your support:

Step 1: Embarking on a RAP

This process may begin with your colleagues' desire to change their role or a suggestion from someone on the team that noticed a significant opportunity for improvement.

Ideally, the person doing the RAP should find a "peer mentor." That figure will provide guidance and encouragement through the process. As the Ian Martin Group suggests, it's best if the mentor is not also an advisor.

Step 2: The announcement

Your colleague will announce the start of the RAP to the team. That communication should mention the date on which the results will be presented—it should be no more than a month from the announcement—and include an invitation to any team members that want to contribute their advice.

Step 3: Self-reflection

During this step, the person will invest time in self-reflection. They may ask themselves what led to this process, what are their strengths, talents, and interests, and what they could do to increase their engagement and impact. They also need to reflect on how their actions may impact the rest of the team.

Step 4: The advice process

Your colleague should ask at least three team members, including you, for advice, but others can participate if they feel they have something meaningful to contribute.

You could expect questions like:

- What do you see as my strengths, and what tasks are in alignment with them?
- What do you think I could change to increase my impact?
- What have you identified as my areas of improvement or skills I could acquire?
- Who could be willing to pick up any tasks I'm leaving behind? How could that transition happen?

Ideally, people go through a RAP with an open perspective to feedback and ideas beyond their own. The best outcome requires participants to be vulnerable and aware of their strengths and possible areas of improvement. But offering feedback is not always easy. Sometimes, the person on the receiving end doesn't know how to process all the feedback on their performance or situation, let alone act on it. In other cases, what makes a person shut down is the way we deliver our comments. This is when **Radical Candor** can help you, the advisor.

This term, coined by author Kim Scott, refers to the ability to care personally and challenge directly. Avoiding feedback to protect someone's feelings can be more damaging to them than a harsh critique. However, that is not an invitation to be brutally honest, which usually means being more brutal than honest.

The foundation of Radical Candor is a genuine concern for the other person and a desire to help them improve. To help, you need to challenge them directly. When they know that you care personally, it is easier to accept direct and critical feedback.

Step 5: The decision

Your colleague will consider all the advice they received. Then they will make a decision. The outcome may be choosing a different role, altering their current one or accountabilities, changing their compensation, or exploring a new path at a different organization. If there's no good fit for their skills and interests in the company, parting ways may be the best decision for everyone involved.

Step 6: Presenting the results

Now it's time for your colleague to share the results with the team by creating a summary document. It should include their reflections, reasoning, thought process based on the feedback they received from you and the other advisors, and a transition plan.

In this step, you will know how your advice influenced the decision of your team member.

Step 7: Taking action

The final step is to execute the transition plan if no one objects to it. Finally, any significant changes in responsibility, salary, or employment status need to be fully documented before they can take place.

From this point on, your colleague is solely responsible for ensuring a smooth transition with the team.

Thinking about implementing the Role Advice Process in your organization? Connect with us at connect@humanfirstworks.com. We've helped dozens of organizations implement successful Human First processes.

Do you work at a bigger organization? Check out how the Ian Martin Group does the RAP with 400+ people at teal.ianmartin.com/role-advice-process/.