

The Role Advice Process

Traditionally, organizations create a strategy. They turn their strategies into processes, their processes become job descriptions, and they hire based on "match quality" to those job descriptions. **Then they attempt to train all the differences and uniqueness out of their workforce.**

However, instead of shaping people around roles, why don't we design roles around the skills, interests, and professional growth of employees? If we do, **engagement and performance can increase by up to 87%**, according to the researchers Neel Doshi and Lindsay McGregor. But that raises one question: whose job is to design roles that not only satisfy the company's needs and expectations but inspire people's greatest work?

In traditional organizations, the responsibility to assemble that puzzle falls on leaders. They are the ones that have to craft roles considering both tactical performance and the things that motivate each individual within their teams. If that sounds like an impossible task to accomplish, it's because it is. So to help leaders, the Ian Martin Group developed a tool that transforms role design from an individual process to a collective one: The Role Advice Process (RAP). Here's a comprehensive guide to it.

If you are considering going through this process yourself or you were chosen as an advisor, read:

- **[RAP: Step by Step - The Explorer](#)**
- **[RAP: Step by Step - The Advisor](#)**

Role Advice Process: Step by Step

The Manager

Doshi & McGregor's book **[Primed to Perform](#)** examines the nine practices that influence employee motivation the most. They are:

- Performance reviews.
- Governance processes.
- Compensation.
- Leadership.
- Workforce and resource planning.
- Community.
- Career ladders.

- Organizational identity.
- Role design.

The two authors found that the last one is the most powerful of all. The Role Advice Process allows individuals to redesign their roles through self-reflection and feedback from their colleagues, shifting that responsibility from a central figure—the manager—to each team member.

Edwin Jansen from the Ian Martin Group refers to this tool as "the closest thing to a panacea that [he's] ever seen in business." That is because going through a RAP can benefit individuals in a wide variety of situations. For example:

- Someone that wasn't performing well put themselves on three-month probation with the intention of either improving or leaving the organization. Along the way, they discovered an entirely different role, in which they are now thriving.
- A person decided to take on a parallel role to help another team within the organization.
- A team member chose to leave the company after realizing their ideal role didn't exist.

But for this process to work, people need to step into it with positive intent and honesty. The success of the RAP depends on three elements: clear agreements, honest communication, and personal choice. If someone constantly fails to meet expectations, can't align with the organization's values, or is unwilling to reflect on and change behavior that affects the rest of the team, this tool won't help them. For those aware of their strengths and weaknesses and those who believe they could be doing more, the RAP is an opportunity to make their highest impact in the organization. Here are the steps of the Role Advice Process:

Step 1: Embarking on a RAP

It begins with a team member's desire to change their role or a suggestion from a colleague that noticed a significant opportunity for improvement.

The Ian Martin Group recommends that the person going through the RAP finds a "peer mentor." This figure will provide guidance and encouragement through their process. It should be someone that can be both candid and supportive and has experience with RAPs.

It's best if the mentor is not also their manager or team leader to avoid subtle conflicts of interest.

Step 2: The announcement

The individual 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.

In smaller organizations or those transitioning towards more self-directed leadership, managers should join the process at the end, not the beginning. They certainly can contribute with ideas later but not be part of the initial contributing peers.

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

The individual going through the RAP should ask at least three team members for advice, but anyone who feels they have something meaningful to say can participate.

The person could ask their peers 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?

If a team member chooses you as an advisor or you want to contribute ideas at the end of the process, using **Radical Candor** can help you deliver your feedback. That term, coined by author Kim Scott, refers to the ability to care personally and challenge directly. 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

In this step, the person will consider all the advice they received. Then they will make a decision. The outcome may be:

- Choosing a different role.
- Altering their current role or accountabilities.
- Changing their compensation.
- 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.

If you are still early in the transition to self-management, the manager or leader can keep veto ability on the decision.

Step 6: Presenting the results

Now it's time for the person to share their results by creating a summary document. It should include their reflections, reasoning, the decision based on the feedback from the team, and a transition plan.

Step 7: Taking action

The final step is to execute the transition plan if no one objects to it. Finally, any significant change in responsibility, salary, or employment status needs to be fully documented before it takes place.

From this point on, the individual 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/.