

Template: Internal Mobility & Promotion Policy

What this is

A sample policy to use as a template when building your internal mobility and promotion policy.

Why this matters

The shift for internal mobility happens quickly once you surpass 20 employees. In what seems like a blink of an eye, managers no longer have full visibility into performance and career ambitions of every employee and so it becomes harder to objectively determine who should be promoted or take on that newly created role. This can lead to perceptions of bias and disengagement of high performing team members if they don't feel the subjectivity of the process worked in their favor. Starting with a two to three page hybrid policy/process document can be a culture saver before you hit this inflection point.

When to implement

Once you begin piecing together your first performance system. Ideally at or just before growing to 20 employees.

How to use this template

On the next page you will find a policy template with guiding text. Make a copy and update for your company. Best practices are included within this template. If something is irrelevant for your size and scale, delete or modify to fit the current needs within your company.

POLICY TEMPLATE: INTERNAL MOBILITY & PROMOTION

Internal candidates & conversions:

As we continue to scale our company and develop our employees, hiring managers are likely to experience:

- a. An employee on a different team expressing interest in working on their team
- b. An employee who is ready for promotion
- c. A temporary employee or contractor expressing interest in converting to full-time
- d. A temporary employee or contractor applying for a different position within

[COMPANY]

The below guidelines apply to each scenario to ensure that we are transparent with our hiring practices, opening opportunities in an equitable way, and providing the space for applicants to both apply and be considered.

In these scenarios, it could be easy to inadvertently circumvent our intended goals of building a diverse team and upholding an equitable hiring process. With these goals in mind, **the process is outlined below:**

1. Once a regular headcount is officially approved [INSERT WHO APPROVES HEADCOUNT], [INSERT WHAT HAPPENS NEXT - e.g. It will be added to the open headcount tracking sheet or a position will trigger a new opening in the applicant tracking system (ATS)]
 - a. [INSERT EXPECTATIONS OF HIRING MANAGERS TO POST A JOB - e.g. Similar to any other position to be hired, a job description and job position launch plan will be created by the hiring manager in partnership with recruitment (if in place) to start the interview process]
2. The position must be open for a minimum of 7 business days both internally and externally for conversions (hiring managers may opt for internal only when at least one qualified and interested internal employee is likely to express interest). During this 7 day period, current employees, temporary employees or contractors may apply for the open position.
 - a. Posting guidelines: All internal jobs will be posted in [ATS] Internal Job Board. You can access the job board here or [INSERT BASIC NAVIGATION INSTRUCTIONS IF EMPLOYEES HAVE ATS ACCESS].

Considerations for the Recruiting Team and Hiring Manager:

- There are two types of internal moves: internal promotion and internal transfer

- **Internal promotion:** This is when an employee is moving up a level in their existing career path or a different career path
 - In-line promotions (AKA next level in their existing career path) are typically aligned with an employee's development plan and do not require an internal opening via the recruiting team, unless multiple employees are eligible and would qualify. In-line promotions do not qualify for automatic backfill approval.
 - New position promotions (AKA net new headcount) will have a requisition ID and may be aligned with an employee's development plan and if so, may not require an internal opening via the talent team, unless multiple employees qualify.
- **Internal transfer:** If a position is opened via the recruiting team, once the successful internal candidate is identified, the recruiter notifies [INSERT HRIS/OPERATIONS EMPLOYEE] of the successful candidate. They will then configure hire/promotion in [INSERT HRIS] and determine compensation [INSERT COMPENSATION EMPLOYEE] and administer documentation needs (offer letter if temporary employee is converted to full-time, etc.)
 - [INSERT ACCOUNTABLE EMPLOYEE] will prepare a notification for the employee outlining changes to role/compensation and effective date
- Never promise conversion or transfer based on performance alone
- Always let temporary employees / contractors know the interview process guidelines for roles of interest that come up, including the role they are performing as part of their current assignment
- How long after 7 days to leave a position posting open will depend on:
 - Performance of the temporary employee or contractor being considered
 - Whether or not it's a new role (first time being recruited) vs. a role we have hired before and have a good understanding of the available talent pool from past openings
 - Job post announcements will be at the manager's discretion, however we strongly recommend posting all internal roles on [INSERT RELEVANT CHANNEL] to share with Employees

Consideration for Internal Employees:

- To be eligible for consideration for internal openings, employees must be in good performance standing (e.g. consistently meeting or exceeding expectations and not on a Performance Improvement Plan) and meet the minimum timeline requirements for time in role (12 months*)
- If chosen as the successful candidate for an internal position, compensation will be aligned (adjusted upward or downward) to the salary bands of the new position.
 - **Example 1:** [INSERT EXAMPLE RELEVANT TO YOUR TEAM]

*Time in role can vary based on the level, the needs of the business, and other factors

Backfill Guidelines

- If an internal employee applies to an open role (net new headcount) and is the successful candidate, a backfill for the employee's previous position is automatically approved (same level/position).
 - Up-leveling or down-leveling backfills requires additional approvals via the [INSERT TEAM RESPONSIBLE FOR APPROVING]
 - If an internal employee is promoted in line (not a net new headcount), a backfill is not automatically approved
- If an employee resigns, a backfill is automatically approved for the same position/level (*aligned to the business needs)
 - Up-leveling or down-leveling backfills requires additional approvals via the talent team
- 1099 contractor and temporary employee backfills are not automatically approved
 - If additional support outside of approved headcount is needed, consult [INSERT TEAM]

Documentation handoff guidelines (handoffs between systems, needs from recruiting re: tracking requisition numbers, etc):

- **Full-Time Employee applying for an internal role**
 - [UPDATE STEPS ACCORDING TO YOUR COMPANY WORKFLOW/SYSTEMS]
- **Full-Time Employee being promoted to the next level within the same team**
 - [UPDATE STEPS ACCORDING TO YOUR COMPANY WORKFLOW/SYSTEMS]
- **Temporary Employee applying for an internal role**
 - [UPDATE STEPS ACCORDING TO YOUR COMPANY WORKFLOW/SYSTEMS]
- **Contractor applying for an internal role**
 - [UPDATE STEPS ACCORDING TO YOUR COMPANY WORKFLOW/SYSTEMS]