

Case Study – A Promotion That Went Wrong



The Scenario

An international engineering company recognised that they were in danger of losing some highly skilled craftsmen¹ unless they were able to find a way to reward them better. The solution they came up with was to promote these key people to become Team Leaders. This enabled an enhanced remuneration package to be provided and also served to demonstrate that the company valued the contribution of the craftsmen.

The Resultant Problem

The company used their competence model to identify what needed to be done to identify what training need to be provided to equip the people with the requirement skills.

The new Team Leaders were then put through a training programme covering such things as Conducting Performance Reviews, implementing Disciplinary Procedures and Conducting Team Meetings and Briefings.

Despite the training being well designed and conducted to a high standard, it soon transpired that there was a big discrepancy in the performance of the new Team Leaders. It also became apparent that quite a lot of them hated their new role and a few sought to take advantage of a voluntary redundancy package. One also applied to take early retirement.

The solution the company came up with was to suggest the under-performers were encouraged to resume their original jobs, at their previous remuneration levels. This resulted in the trade union getting involved and demanding that as the company had made the mistake the people involved should not have their pay reduced. They reinforced the demand by threatening industrial action.

The Solution

CERT was called in to help resolve this problem and adopted the following approach.

1. The job of Team Leader was carefully defined.
2. The *Eligibility* (Skills, qualifications and experience etc) and *Suitability* (Personal attributes, natural behavioural tendencies etc) were elicited.²
3. A gap analysis was undertaken to identify any mis-match between the requirements of the job and those possessed by each of the Team Leaders in terms of both *Eligibility* and *Suitability*.
4. Alongside this, the three highest performing existing Team Leaders were profiled to elicit their *Suitability* profile.

It quickly became apparent that many of the new Team Leaders were a poor match for the job, in terms of *Suitability*. This was hardly surprising as the selection process had not taken this into account.

The matter was successfully resolved by CERT acting as an intermediary between the trade union, the people involved and the company management. It involved several Team Leaders being assigned to a new role specially created to make best use of the skilled craftsmen who had been promoted to Team Leaders. The role was called a Craftsman Coach, which accurately described the main element of the job.

¹ The term *Craftsmen* is used because the people concerned were all male.

² The *Belbin Team Role individual reports and profile job requirement assessments* were used for this purpose.

A follow up survey elicited that the people who migrated to this role were happy as they were able to do what they liked doing most and did well. The company was happy because they achieved their original aim of retaining the people with valuable skills. The Trade Union was happy because the people involved received the same remuneration as the Team Leaders. The most moving and impressive thing of all for me was the fact that a specialist welder decided to continue with his coaching role on a part time basis after he retired, because he loved what he was doing.

The approach adopted was regarded by virtually everyone involved as being fair, logical, and objective. It was also transparent and demonstrably non-discriminatory.

A new procedure for appointing Team Leaders was adopted that took account of the need to consider the suitability as well as the eligibility of candidates.

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