A Step by Step Guide on How to Define a Role

Index

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>INTRODUCTION</td>
</tr>
<tr>
<td>2</td>
<td>WHY IS ROLE DEFINITION IMPORTANT?</td>
</tr>
<tr>
<td>3</td>
<td>USING EXISTING DOCUMENTATION WHEN DEFINING A ROLE</td>
</tr>
<tr>
<td>4</td>
<td>USING THE CAPABILITY CARDS WHEN DEFINING A ROLE</td>
</tr>
<tr>
<td>5</td>
<td>UTILISING THE CRITICAL INCIDENT TECHNIQUE WHEN DEFINING A ROLE</td>
</tr>
<tr>
<td>6</td>
<td>USING REPERTORY GRID INTERVIEWS WHEN DEFINING A ROLE</td>
</tr>
<tr>
<td>7</td>
<td>RESOURCES</td>
</tr>
</tbody>
</table>
This guide has been developed to assist managers when they are defining a role. This guide should be used when defining existing roles which have changed or where new roles are being created.

This guide should be used in conjunction with the Right Job, Right Person! Recruitment and Selection Framework, in particular Stage 1 – Define.

Role definition is the first step in the recruitment and selection process. This process should be undertaken as soon as you have identified a vacancy.

Role definition is also essential for developing and writing a realistic and accurate statement of duties. For more information on writing statements of duties see the information sheet titled A Step by Step Guide to Writing a Statement of Duties.

Why is Role Definition Important?

How will you define the role so that you get the right person in the right job at the right time?

Given the increasing need for flexibility in role structure, content and longevity, it is generally accepted that a multi-method approach is needed to do justice to the richness of most roles. This is particularly true when you have decided that there is a need for a new role with fresh selection criteria.

Key Points

Remember:
Effective job analysis is the foundation for an efficient recruitment and selection process. But roles are not static. They constantly evolve in response to changes in the team and the agency. Therefore, role definition is not permanent, and should be revisited regularly.

Give thought to cultural sensitivities when defining any role to ensure that no particular group is disadvantaged by the methods you chose.

Pitfall
A common pitfall when defining a role is a tendency to maintain the status quo. This is the perfect time to think laterally. You must consider the role at both the functional level (the outcomes required), as well as the behavioural level (how you would like the role to be done). This will give a better picture of what the role offers and demands, ensuring that you consider diversity when defining the role and finding the right person for the role.
Use the information gathered when defining the role to inform all of the stages of recruitment and selection, including the development of an accurate and realistic statement of duties, appropriate selection options, targeted advertisements, appropriate advertisement placement and selection.

### 3 USING EXISTING DOCUMENTATION WHEN DEFINING A ROLE

**Using Existing Documentation**

Existing documents such as statements of duties, training manuals, selection criteria, workforce planning documentation, business plans etc may be used to get more information about the role.

**When to Use**

They are most useful when you have recently conducted an identical selection process (i.e. within the past six months) and can be certain that no changes to the role are likely within the next six to nine months.

**Benefits**

- Requires little additional investment on the hiring manager’s behalf.
- Allows for standardisation across selection processes.

**Points to Consider**

- All documentation needs to thoroughly reviewed to ensure that the role has not changed and that all of the information is relevant.
- This approach will not be useful if the role is new or has been modified.

### 4 USING THE CAPABILITY CARDS WHEN DEFINING A ROLE

The Capability Card set included in the kit helps you define the personal qualities, skills and knowledge that an individual needs to perform effectively in the role.

While each role is different, there are some common capabilities that are important and relevant to many roles, for example, teamwork, problem solving, initiative. It is the combination of these capabilities that defines a particular role.

Blank cards are included so you can create your own capabilities if required. The cards can also be changed so that the words or language better reflect the work done by the team or the business unit.

**When to Use**

The Capability Card set can be used at each stage of the ‘define’ process.

**Benefits**

- Provides a structured, simple way to define the capabilities required for success.
• Very useful when the role is new, or has been varied.
• Differentiates between personal qualities, skills and knowledge required for success.

**Points to Consider**
You need to ensure that you consider any specific skills required for the role which are not covered by the Capability Card set.

**How to Use the Cards:**

Ask others to undertake the card exercise with you. (E.g. existing role holder, colleague, manager, clients or HR).

Ask each person to choose six cards that reflect the role and the most critical skills, knowledge and/or personal qualities required.

**Focus on the role now and into the future.**

Think about what skills, knowledge and personal qualities are needed to complement the existing team.

Then think about the skills knowledge and/or personal qualities needed to perform the role.

Discuss commonalities and differences and come to a consensus about the final capabilities - choosing four to six capabilities works best.

At this point, determine any specific capabilities required which are not captured by the Capability Cards e.g. specialist knowledge, or essential qualifications.

Use the capabilities that the group has identified to create the selection criteria. Aim to end up with 4 to 6 selection criteria.

**5 UTILISING THE CRITICAL INCIDENT TECHNIQUE WHEN DEFINING A ROLE**

**Critical Incident Technique**

To clarify your thoughts about what the role entails you could consider several incidents critical to achieving the job results that were handled either extremely well or extremely badly.

The direct line manager can explore these in depth to determine what the role holder actually did (in behavioural terms) and what skills were needed to cope effectively with the incident.
Example Incident

When I was working on the counter, I had to pacify and negotiate with a group of young men who came in drunk. They started to be abusive to other staff and clients, complaining about the service they were receiving. I had to intervene, calm the situation down, and discuss the problems with them. In the end, the group left without further upset.

This is then explored more thoroughly to understand the key personal qualities, knowledge and skills which assisted this person to effectively manage the situation.

When to Use

- When there have been problems with attracting or keeping a person in the role. It can help to refine the key criteria for success.
- When you are new to the team, but the role has already been established.

Benefits

- The approach explores actual events that have occurred within the role in the past, rather than opinions and speculations about what might be important.
- The technique provides a rich source of real life experiences on which to base the content of selection options, such as structured interviews, work sample tests and referee checks.

Points to Consider

- The approach takes time.
- It is difficult to use for new roles, as it relies on information about situations in a role which already occurred.

Repertory Grid Interviews

The manager generates or ‘constructs’ key themes by choosing three people who have performed the role (present or past), identifying how two are different from the third in terms of the way they perform their jobs. This is repeated until a number of themes associated with effectiveness in the role have been built up.

The technique can assist managers to quickly identify skills associated with success in a particular role.

Line managers can use this technique or can invite other team members to participate in the process.
Example Theme

Jane and Jean prepare by reading and planning before group meetings. Peter relies on thinking on his feet, and his contributions are usually not as useful.

The manager then explores this theme further to arrive at a key capability for success in the role.

**When to Use**
- When there have been problems attracting or keeping a person in the role – it can help to refine the key criteria for success.
- When you as a manager are new to the team, however, the role is established.

**Benefits**
- Helps to pinpoint qualities of actual people who have performed that target role in the past.
- Helps to pinpoint personal qualities associated with success, rather than just skills and knowledge.

**Points to Consider**
- The approach takes time.
- Use for existing or past roles, rather than newly created roles.

**RESOURCES**

- [Right Job, Right Person! Recruitment and Selection Framework Stage 1 - Define](#)
- [Capability Cards](#)
- [A Step by Step Guide to Writing a Statement of Duties](#)