

Internal Move Checklist

What employees and managers need to do when someone changes teams

THE IDEA

In “The Art of Poaching,” I talk about how internal poaching can be a thoughtful exchange of talent, or a really good way to irritate everyone involved. Done well, it can help an A-player find the right seat while keeping great talent in the organization.



How to use this resource: When an amazing employee is headhunted into another internal department, several people have to-do actions. Use this checklist to understand what falls to the employee, the hiring manager/poacher, and the current manager so the move can happen openly, respectfully, and with good intent.

ROLE ONE

The employee / poachee

BEFORE ANY POACHING CAN OCCUR

Be consistently open with your manager about your interests and five-year plan. Then, when opportunities come up, they won't be caught off guard that you have plans for growth.

Find a mentor inside the company—and one outside the company—to help you arrive at that five-year plan.

Once a role opens:

- ☐ Allow the hiring manager (poacher) to approach you
- ☐ Let the managers speak before you discuss the move with your current manager

- ☐ Don't make any moves without involving your current leader
- ☐ Be open and candid with your current manager
- ☐ Explain your interest (and why) in the new position
- ☐ Be discreet; don't spread your interest around to your peers

AN IMPORTANT EXCEPTION

If you're working in a truly toxic environment where your leader is the problem—an immature communicator or, worse, a saboteur, for example—the normal process may not apply.

INTERESTED, BUT NO ONE'S POACHING YOU?

If you're interested in an open role but the hiring manager hasn't approached you, apply to the open req through HR and let your manager know you applied.

ROLE TWO

The hiring manager / poacher

- ☐ Speak with the employee briefly to gauge whether there's any interest
- ☐ If there's no interest, move on. Don't keep beating the drum
- ☐ If there is interest, talk to their current manager before discussing the potential move further with the employee

ORDER MATTERS

Talk to the current manager before you and the employee start discussing the potential move. Get this out of order and you're going to look like a poacher. Let the managers talk first, and it look (and feels) more like a civil exchange of personnel.

- ☐ Recognize that taking an A-player from any team will affect both that team and the company
- ☐ Work with the current manager and employee on appropriate timing based on what's in flight
- ☐ Work with your leader/exec to navigate compensation changes, if any, as well as timing
- ☐ Be mature and appropriate about it—don't brag or be demeaning

ROLE THREE

The current manager

- ☐ Congratulations! You helped position someone so they were noticed.
- ☐ Be the bigger person here. Don't stir up discontent in the organization or complain to multiple people about someone "stealing your resource"

GUT CHECK FOR THE CURRENT MANAGER

This shouldn't feel threatening.

Annoying? Yes. Having to get a backfill? The worst. But you should also be a proud mentor watching your team member go do great things.

If it does feel threatening, figure out why:

- Are you scared you won't get a backfill?
- Are you scared your team will fall apart without that A-player?
- And this last one's hard: Are you scared because that A-player is actually carrying the team and doing your job?

- ☐ When asked for backchannel feedback, be candid, helpful, and appropriate. Give the same feedback you would if an external employer asked for a referral
- ☐ Be kind, clear, candid, and have good intent
- ☐ Don't foster frustration within your current team. Be a team player

For the employee:

- ☐ Don't discuss your compensation with anyone else other than HR or your new hiring manager. It's technically legal, but typically does nothing but cause internal drama.
- ☐ Be patient while PeopleOps, compensation, and other logistics are worked out
- ☐ Let the hiring manager guide when and how the move is communicated internally
- ☐ When your current and new managers say it's time, tell your current team
- ☐ Don't gloat