

Journal of Human Resource and Leadership (JHRL)

Human Resources Manager and Investment and Financial Analyst Jobs

Fariyal Hamed

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^{1*}Fariyal Hamed

Department of Business Administration, Hamdan Bin Mohammed Smart University, United Arab Emirates

Article History

Received 22nd November 2025

Received in Revised Form 15th December 2025

Accepted 20th January 2026



How to cite in APA format:

Hamed, F. (2026). Human Resources Manager and Investment and Financial Analyst Jobs. *Journal of Human Resource and Leadership*, 11(1), 47–58.
<https://doi.org/10.47604/jhrl.3603>

Abstract

Purpose: This paper develops a structured staffing plan for two strategic organizational roles: the Financial and Investment Analyst and the Human Resources Manager. The purpose of this paper is to propose role-specific recruitment, selection, onboarding, and retention strategies that improve hiring quality and support sustained organizational performance.

Methodology: Using a descriptive and analytical methodology, the study synthesizes established human resource management and staffing literature. The paper proposes internal recruitment for the Financial and Investment Analyst position to leverage organization-specific financial knowledge.

Findings: For the Human Resources Manager role, external recruitment through professional networking and social recruitment channels is proposed to broaden the candidate pool and enhance talent quality. Selection systems are structured using multi-method assessment approaches that combine resume screening, ability tests, and work sample assessments. The study also outlines cut-score banding as a flexible decision rule.

Unique Contribution to Theory, Practice and Policy: The main implication of this paper is that staffing decisions should be aligned with job-specific competencies. Overall, the framework provides an integrated staffing approach that enhances workforce capability, improves retention, reduces turnover risk, and strengthens organizational performance.

Keywords: Staffing Strategy, Recruitment, Selection, Internal Recruitment, External Recruitment, Financial and Investment Analyst

JEL Codes: M12, M51, M54

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INTRODUCTION

In the competitive environment of the business world, staffing strategies are crucial to attract the most suitable employees to the organization. As the human resources department performs different functions such as recruiting, selecting, and retaining top talent, it directly affects the organization's performance and sustainability. Gberekvie (2010) discusses recruitment, selection, and retention strategies that function as strategic mechanisms that directly shape employee performance and organizational effectiveness. These roles require the most suitable employee who will achieve the organization and goal by ensuring financial efficiency and engaging them more in the workforce, enhancing the organization's performance.

In the first role, which is a financial and investment analyst, a great focus on evaluating financial data, analyzing industry, and making informal recommendations will help optimize investments. This role requires a high degree of analytical ability to use financial modeling tools. The other role, which is the human resources manager, requires a specialist who specializes in HR functions such as talent acquisition and increased retention compensation, compliance, and labor regulation. According to Golec and Kahya (2007), this position requires strategic thinking, exceptional communication skills, and the ability to manage conflict between employees.

This paper aims to develop appropriate staffing strategies and a targeted recruitment and selection strategy for both the roles of the financial and investment analyst and the Human Resources Manager. In addition to that, the retention management plan will address the challenges of sustaining high-performing employees in the organization. After addressing both the managerial and analytical roles of the study, focusing on how the staffing approaches can be used to meet the distinct requirements for the different job categories within the same organization.

The scope of the paper is limited to the analysis of recruitment, selection, orientation, socialization, and retention practices. The study mainly focuses on the internal recruitment strategies, focusing on the Financial and Investment roles. In addition, the paper mainly explores how the selection tool, including the ability tests, performance appraisal, and decision-making models, is used with the structured offer letters and the onboarding processes.

Problem Statement

Organizations often face challenges in designing staffing systems that effectively match job-specific competency requirements with appropriate recruitment, selection, onboarding, and retention practices. In many cases, similar staffing approaches are applied across different job categories, which may result in skill mismatches, longer adjustment periods, and increased turnover risk.

Despite the availability of established human resource management frameworks, there remains a practical gap in applying role-specific staffing strategies for both technical and managerial positions within the same organization. This study addresses this gap by developing a structured staffing framework for the Financial and Investment Analyst and the Human Resources Manager roles. The main beneficiaries of this study are human resource practitioners seeking to improve hiring quality, organizational leaders aiming to reduce turnover, and students interested in applied staffing system design.

Research Gaps and Research Questions

Although much research exists on recruitment, selection, onboarding, and retention practices, several gaps remain in the applied staffing literature. First, most prior studies examine the staffing strategies in isolation and focus on these processes separately. This creates a gap in the understanding of how these functions can be aligned systematically for the different job categories. Second, the existing studies provide limited guidance on how staffing strategies should be differentiated between highly technical roles and managerial roles. Finally, The literature offers limited empirical guidance on the multi-method selection systems, as well as the decision rule.

Based on these gaps, the study is guided by the following research questions:

- RQ1: How can recruitment, selection, onboarding, and retention practices be integrated into a coherent staffing framework for different job categories within the same organization?
- RQ2: How should staffing strategies be differentiated for technical roles and managerial roles to improve hiring quality and role fit?
- RQ3: How can multi-method selection systems be designed to balance predictive accuracy, fairness, and practical feasibility?

METHODOLOGY

The methodological approach in this paper adopts a descriptive and analytical nature. It depends on the relevant academic literature in human resources management and staffing that is established on the theories and empirical studies to justify the proposed recruitment and selection strategies. This paper depends on the integration of best practices from scholarly sources to design a practical and job-specific staffing framework for both roles.

Research Design and Target Population

This study adopts a descriptive and analytical research design based on a review and synthesis of established human resource management and staffing literature. The design is appropriate for examining and developing role-specific staffing strategies without collecting primary empirical data, as the study focuses on integrating theoretical frameworks and best practices into an applied staffing model. The target population of the study includes organizations seeking to recruit and select Financial and Investment Analysts and Human Resources Managers, as well as human resource practitioners responsible for designing and implementing staffing systems for technical and managerial positions. In addition, the study is relevant to students and academic instructors interested in applied staffing and selection system design.

FINDINGS

Recruitment Strategies

Financial and Investment Analyst

For the Financial and Investment Analyst role, an internal recruitment strategy is recommended because of the importance of familiarity with organizational processes and internal financial data. Although internal recruitment may limit exposure to external market perspectives, this limitation is less significant for this role because performance depends on organization-specific financial knowledge. This role requires a deep understanding of the company's financial

operations and investment decision-making systems. In addition, internal recruitment supports cost efficiency by reducing advertising and onboarding expenses. Open internal recruitment through intranet postings and internal email notifications ensures equal access for qualified employees while enabling faster role integration. This approach aligns with competency-based staffing principles that emphasize matching job requirements with contextual and experiential knowledge (Golec and Kahya, 2007).

Human Resources Manager

For the human resources manager, the **external** recruitment strategy is going to be applied as the most effective recruitment strategy. It helps to attract a more professional and associative network of human resource managers through the LinkedIn website. External is the best method, as it helps to ask about this high-quality candidate or has a different potential of applying for this role (Azmy, 2018).

Social Recruitment Resources

This would be achieved through employee referrals and social network sites. This strategy is used because it helps attract different candidates to be attracted. This allows for professional and engaged resources through different platforms, including LinkedIn. In addition to that, it allows for a higher quality of attraction for different candidates by understanding the company's culture and how it helps the employees achieve higher success. It is cost-effective for the strategy as using online platforms would help to minimize the cost of attracting employees. Moreover, it strengthens the brand of the company. It is a speedy process that enhances the efficiency of the organization's resources and recommendations (Azmy, 2018).

Selection Strategy

Human Resources Manager

External Selection Strategy

Initial Assessment Strategy

Using **resumes and cover letters** is a fundamental initial assessment process, as it helps to identify the candidates who are going to meet the qualifications and specifications required for the job for the investment financial analysis.

The reason behind choosing the resumes and cover letters is because it helps the recruiter to find if the candidate has potential for the position, depending on their educational background, relevant work experience, and problem-solving techniques. Also, initial interviews are important because they help to keep the candidate motivated, communicate, and think to make decisions. The advantages of resumes and cover letters are that they reflect on the candidate's background and capabilities. On the other hand, the advantages of resumes and cover letters might be subject to bias through a formatting presentation, which might be represented by different biases.

Subalternate Assessment Methods

a. **Ability test:** This test is going to be used because it helps to assess individuals' ability and capacity to function in a certain way using a mixture of different tests, such as cognitive tests. This test helps to assess the data interpretation quality and its ability to solve problems. It also allows to compare different candidates by measuring their conjunctive ability. The advantage of this test is the least expensive of all the substantive assessment tests that help to measure the ability to think, depending on memory, reasoning, and verbal and mathematical abilities. This intelligence test indicates how individuals might take courses at similar schools and specific abilities. It is one of the most valid tests and appears to generalize across all members and all different cultures. It might lead to large economic gains as well as help to decrease employee turnover.
For managers, it should score a correlation of 0.53 as the correlation is higher for medium and high-complex jobs. The advantage of the cognitive test is that it might lead to adverse impacts, as some minority groups or candidates who score on average perform poorly in the cognitive ability test. Some might consider abstract questions, such as quantitative comparison questions, and they are not related to the job. (Azmy, 2018)

b. **Performance tests and work samples.** This test is important to measure the actual performance rather than just the capacity of the position. The manager needs to perform a group of problem-solving exercises. The advantage of this test helps to directly rely on actual job responsibility and helps to measure objectives with high validity. On the other hand, it might be time-consuming and might cost some money when compared to the cognitive ability test and might lead to some stress for the candidates.

Application Blank

Position: Human Resources Manager

Personal Information:

- Full name:
- Email Address:
- Phone number:
- Email Address:
- Date of Birth:
- Nationality:

Education History:

- Education degree:
- Name of institution:
- Degree:

Issue country:

Experience:

- Job title:
 - o Employer name:
 - o Key responsibilities:

- Job (2):
 - o Employer name:
 - o Key responsibilities:

Skills and qualifications:

References:

Financial and investment analyst

Internal Selection Strategies

The Initial Assessment Method

The initial assessment method is the **talent management and succession system**. This method is used to keep ongoing records of old skills, talent, and activities of employees, which facilitates an internal selection system and keeps it updated. It helps to evaluate employees' technical skills, analytical competencies, and past financial performance relevant to the Financial and Investment Analyst role. It helps to identify the employees who are familiar with the accompanying culture and the process. On the other hand, it might be limited by the diversity of ideas and prospects. The disadvantage is that it is highly costly and has moderate availability and validity.

Substantive Assessment Method

- A. **Performance appraisal:** this test is used because it helps to provide a possible internal prediction of future job performance, as it helps to collect from past job performances through the performance process. It has some disadvantages as it helps to gather the information that already exists and captures the ability and motivation of candidates. This method demonstrates criterion-related validity, as past performance in financial analysis can predict future effectiveness in analytical and investment decision-making tasks. On the other hand, the potential lack of a direct relationship between the requirement of the job and the position applied for is called Peter's principle. This method may be affected by rater bias and subjectivity, which can reduce predictive accuracy if standardized evaluation criteria are not applied.
- B. **Job knowledge test:** This includes projecting different financial analyses to understand the market and investment strategies. This would help to develop specific skills in the financial analyst job. It also helps to test the job's ability and seniority. It is measured by paper and pencils or sometimes conducted by computers. It reflects on the assessment of what is learned from the experience and captures the congenital ability of the candidate's ability. To minimize the adverse effects, the test should be standardized and aligned with the job-related financial competencies to ensure equal assessment across candidates.

Decision Making

Based on recruitment and selection strategies, using the most suitable multiple predictor strategy and the cut score method would help to choose the most suitable candidate for the job using the multiple predictor strategy which gives multiple assessment methods using multiple predictor strategies such as **Multiple Hurdles**.

The multiple Hurdle strategy is best used for the ***financial analyst job***. It is used because it helps to put the candidates through different assessments before moving them to the next assessment stage, which helps to ensure that the candidates who are going to complete the next stage are the most suitable ones. By doing this process, we will ensure that only qualified candidates will meet the minimum standards for predictors. Since we have two substantial assessments, the multiple tests are the most suitable strategy because they help to filter out candidates who do not pass the tests. Each job required different requirements, which helped to provide different opportunities for the chosen proficiency across different candidates (Hausknecht, Rodda, and Howard, 2009).

For the human resource manager, ***the multiple predictors of the combined model are***. This model will help me to use compensatory and multiple hurdle models. The combination of these two models helps to make decisions about the candidate who meets at least the minimum qualifications to be able to move to the next stage. This is done through resume screenings. For example, the candidate might need to pass the job knowledge test, and then they will go on to the next test. Using multiple tests, ensure that the candidate is qualified to meet the right minimum qualification, at least to be able to pass to the next stage (Hausknecht, Rodda, and Howard, 2009).

First, the candidate is going to fill out an application form; if he passes, then he goes for the job knowledge test. If he passes this test, he goes for interviews and references. If he is accepted, he is going to have a job; if he fails, he will be rejected.

The ***Cut score*** method is ***banding***. Using the banding method is an appropriate approach to be used for passing scores in the context of measuring flexibility. In the first procedure, the applicants whose scores are within a certain range are considered to have scored equivalently. For example, if the candidates who were going to score between 65 and 70 are unqualified, others who score between 71 and 79 are minimum competency, who score 81 and above are qualified.

This method is used because it is flexible, and it helps to complete different candidates based on multiple stages. Candidates will score within the close range of 90 to 95, for example, to be qualified. It provides fair chances for the qualified individual not be excluded due to other cut scores. However, the use of banding remains controversial in the selection literature, as it does not automatically reduce adverse impact and may raise concerns regarding fairness and legal defensibility if not carefully justified. Other methods are not selected because the top-down selection process strictly ranks candidates on a specific competency.

Offer Letters

For the Investment Financial Analyst Position

Dear candidate,

We are pleased to offer you the position of investment and financial analyst beginning on September 15, 2024. Your office will be located here in our main office at Dream Tower, in the Dubai area. This offer is for full-time employment, meaning you will be expected to work a minimum of 48 hours per week. Extra hours on weekends are also expected during peak production periods.

This contract is offered on a one-year renewable basis. Your starting pay will be 3000 per month based on this company's regular payroll schedule. When you complete one year of employment, you will be eligible for the benefit plans provided in our written description of those plans. Additional compensation and overtime will be paid according to the organization's policy. As a full-time employee, you will have access to the following benefits of vacation leave. You will be working from 8:00 AM until 4:00 PM from Monday to Saturday.

We are pleased to offer you a hiring bonus at one time as a signing bonus within 30 days of the first paycheck and relocation assistance of up to 5,000 AED for moving expenses. Your employment is subject to a confidentiality agreement to protect the company's interests.

We must have your response to this offer by December 5, 2024. If you wish to accept the offer we specified in this letter, please sign and date as a copy will be handed to you. If you wish to discuss any of these or any other terms, please do so before December 5, 2024. Please feel free to contact me.

Sincerely,

Firyal Hamad

Senior Vice President, Human Resources

I accept the employment offer and the content of its terms in this letter. I have received no promises other than the content in this letter.

Sign:

Date:

For the Human Resources Manager

Dear candidate,

We are pleased to offer you the position of Human Resources Manager beginning on January 1, 2025. Your office will be located here in our main office at Dream Tower in Dubai. This offer is for full-time employment, meaning you will be expected to work a minimum of 48 hours per week. Extra hours on weekends are also expected during peak production periods.

This contract is offered on a one-year renewable basis. Your starting pay will be 15,000 per month based on this company's regular payroll schedule. When you complete one year of employment, you will be eligible for the benefit plans provided in our written description of those plans. Additional compensation and overtime will be paid according to the organization's policy. You will be eligible for a performance-based bonus of 10% according to the company's policy. As a full-time employee, you will have access to the following benefits, such as health and dental insurance. Also, vacation leaves and holidays are provided. You will be working from 8:00 AM until 4:00 PM from Monday to Saturday.

We are pleased to offer you a hiring bonus at one time as a signing bonus within 30 days of the first paycheck and relocation assistance of up to 2,000 AED for moving expenses. Your employment is subject to a confidentiality agreement to protect the company's interests.

We must have your response to this offer by December 5, 2024. If you wish to accept the offer we specified in this letter, please sign and date as a copy will be handed to you. If you wish to discuss any of these or any other terms, please do so before December 5, 2024. Please feel free to contact me.

Sincerely,

Firyal Hamad

Senior Vice President, Human Resources

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Sign:

Date:

Orientation and Socialization

Orientation

Orientation represents the initial stage of the broader onboarding process and aims to introduce new employees to the organization while facilitating their early adjustment and role understanding. To this day, supervisors have a great role in familiarizing the employees with the organization. Contemporary organizational entry theory mainly focuses on the orientation with the first phase of the onboarding process. The newcomers start the socialization process and develop the early role of clarity as well as organizational commitment.

- As part of the initial onboarding phase, the following orientation activities are implemented, send them welcome packages and providing them with details such as the dress code, good work ethics, smoking restrictions, and emergency procedures.
During the first day of the orientation:
 - o First, discuss the company's culture, values, and history with new employees so they get to know the organization.
 - o Then introduce the new employees to their colleagues and supervisors
 - o After that, schedule time for paperwork and socializing.
 - o Tell employees what they should do next in their schedule.
 - o No harm if the orientation is fun by offering ways to make it fun.
- During the first week, training should be conducted to give an overview of the mission, vision, and key values of the organization and inform the new candidates to meet with the stakeholders.
- During the first month, clarify any questions or concerns and ask if any help should be provided.
- Within the first six months, an evaluation of the progress and discussion of the employees' goals and opportunities should be conducted.

Socialization

Socialization is considered a longer-term organizational entry process. According to Van Maanen and Schein's socialization framework, this process consists of three main stages: pre-arrival, encounter, and metamorphosis. Pre-arrival is considered the initial knowledge of the organization, as they get to know the details about the organization. Encounter is where the employees start to recognize the difference between their expectations and the reality in the organization. In human resource management, research indicates that effective socialization is related to higher job performance, stronger organizational commitment, and lower turnover intentions.

Metamorphosis represents the stage in which newcomers internalize organizational norms and values and adapt their behaviors to align with the organization's culture.

People: make relationships with colleagues, managers, and other employees. Participate in activities and build relationships and networking opportunities.

Performance proficiency: gaining a clear understanding of the job expectations and the organization's culture and providing coaching and regular feedback to the new employees.

Organizational strategies, goals, and values should be clear to the new employees, and what the organization's priorities, vision, and mission are.

Culture: should be observed and adapted for the organization through written rules that should be stated clearly with integrated information.

Retention Management Strategy

- Providing candidates with career development opportunities to support their professional growth and job satisfaction. Implementing development plans through setting career goals and providing them with mentorship programs to guide them through their progress. This will improve employees' engagement in the work environment and enhance their productivity. This will enhance the overall performance of the organization.
- Schedule conductive balance: this is done by offering a hybrid work environment combining remote and office work. This will ensure that they are offered manageable work hours, which will help them to feel that they are supported and evaluated by their organization.
- Provide competitive compensation and benefits for employees through reward systems that will help them to foster their trust and motivate their participation in the work environment. This is conducted through the introduction of performance-based bonuses, such as incorporating healthcare coverage. Promotions and recognition would offer employees rewards for their achievements. These offers would help to enhance their performance and engagement in the workplace. For example, recognition programs such as "Employee of the Month" may enhance motivation when applied consistently; however, if perceived as subjective or symbolic, their long-term impact on retention may be limited. To ensure effectiveness, reward and recognition systems should be explicitly linked to objective performance metrics and clearly defined evaluation criteria.
- Some intrinsic reward systems might be implemented, such as assuring a ***positive supervisor relationship***. The relationship between the employees and their supervisor is crucial in the workplace, as it will help to foster their loyalty. This is supportive to increase retention and fostering their participation and engagement.

Using ***post-exit surveys*** would help to understand why employees might leave the organization and help to find the gaps in the practice. Also, this would help to improve the retention strategies implemented by the organization. Moreover, providing surveys will help them to measure satisfaction and to measure their work-life balance. Depending on these results, it will help the human resources department to act proactively to decrease employee turnover (Cloutier *et al.*, 2015).

Conclusion

At the end of this report, a detailed and comprehensive overview of the recruitment and selection process for Human Resources Manager and Investment and Financial Analyst jobs is provided. Different recruitment strategies are conducted to ensure that each job will hire the most suitable candidate. Different internal and external selection strategies are used. Decision-making and job offers are conducted through different strategies. The orientation and selection are conducted through organized steps. Finally, retention strategies are followed to decrease employee turnover.

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