



# Transition Tips for New Managers

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## Learning Objectives

Attendees will be able to:

1. Explain how many first time leaders fail.
2. Explain the difference between leadership and management skills.
3. Learn about the fundamental leader skills essential to success.

## Session Description

Are you a new manager/supervisor, or about to become one? Moving into a position of leadership and authority is one of the most difficult career transitions to make. Only four out of ten people successfully make the transition. Numerous challenges are ahead. Your responsibilities are greater, co-worker relationships are changing, as is the organization's expectations of you. There are many books available describing effective and successful leaders, but few address the challenges of learning to lead for the first-time manager. This session offers sound advice and proven strategies to begin your successful transition with grace and competence from staff to leadership.

## Poll

### Who's in a first time leadership position?

- Less than 6 months
- 6+ to 12 months
- 1-2 years
- More than 2 years
- Just interested in topic

Who is/has worked directly for a good **manager**?

Is/was that person a good **leader**?

**Bosses that  
are  
remembered  
fondly**



## Have What It Takes to Lead?

Upper management appointed you.

Your team didn't choose you to be their leader.

It is challenging to earn the team's respect and trust.

You will struggle and make many mistakes.

The journey can be long, quite difficult and intimidating as you reshape your professional identity.

Managers account for  
**70%** of employees' issues

[2014 Gallup poll](#)

Most employees leave because of poor relationships with their managers.

12% of employees quit for higher salaries

75% quit because of their direct supervisor

Gallup

**60% of new managers FAIL**

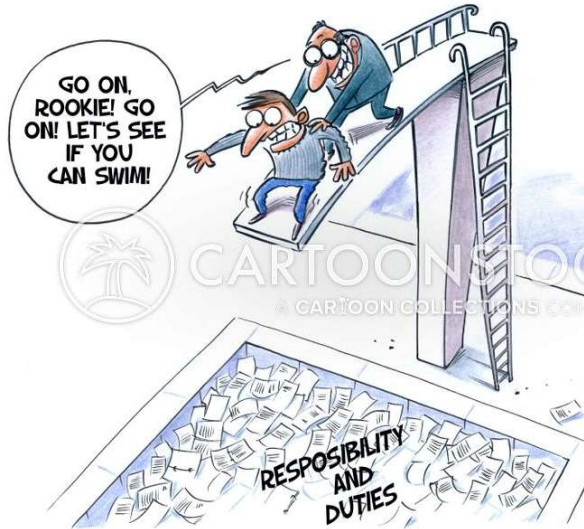
within the first 24 months (*CEB, Inc.*)

Includes undergraduate and graduate Business Administration degrees

## Failed Culture

Most organizations use the “swim or sink” method of leadership/management training.

What about your organization?



Failure is most often due to lack of  
leadership skills,

NOT management skills.

The most important difference between managers and  
leaders is their approach to achieving goals.

# Leader vs Manager





The Pass of Caradhras Scene 2- The Fellowship of the Ring

[www.youtube.com/watch?v=Tlf08NNfagk&t=20s](https://www.youtube.com/watch?v=Tlf08NNfagk&t=20s)

## Defined: **Leader** vs **Manager**

- **Leaders have followers.**
- Makes no difference what your title or position is.
- Think to the future and set the vision.
- Aligning people toward a common goal.
- Inspire others to attain higher achievement (act in a way that inspires others to do their best), move in a certain direction.
- **Power over others** and authority to make decisions.
- Job title with a fixed set of responsibilities: thought of as directing and supervising.
- Work in the present and think execution: focus on organizing and executing tasks.
- Oversee the activities of individuals/group to achieve an objectives/goals.

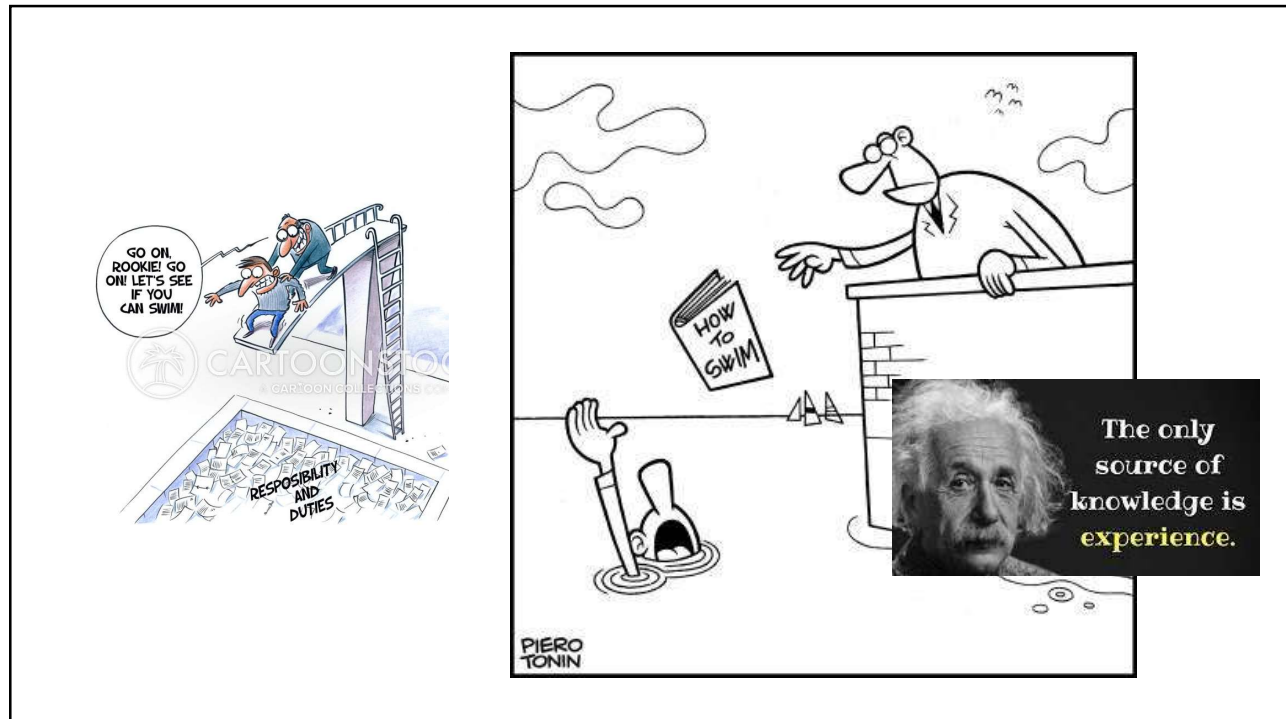


## Defined: **Leader** vs **Manager**

- **Main focus is on people.**
  - Investing time in understanding their employees' passions and values.
  - Provide support and focus on developing the skills needed to long term achieve objectives.
- **Shape culture.** Stand with their team and set the example to inspire action, not demand it.
- **Priority is Focus on processes** that will deliver the desired outcomes based on business objectives. While they do pay attention to the people, that's often not their main priority.
- Follow the vision
- Endorse the culture

## Becoming a Leader is Stressful

- Big **questions**:
  - "Will I like be a leader/manager?"
  - "Will I be good in my new role?"
  - "Who am I becoming?"
- **No immediate answers**; are personal to you and will come with time.
- Change happens **slowly**.
- Your need to **unlearn** a mind-set and habits that have served you to be highly successful before.
- You must **internalize new ways** of thinking and being, adopt new ways to measure success and derive satisfaction from work.
- This psychological adjustment is very taxing.



## Poll

### Who's attended or plans to attend comprehensive leadership training?

- Internal to your organization
- Private professional education company
- College/University
- Military leadership schools
- Other

## Training & Experience

Army Primary Leadership Development: 4 weeks  
 US Army Officer Candidate School: 14 weeks  
 Basic Officer Leader Course: 16 weeks

} 8.5  
Months

Leadership Roles:

Sergeant, Second & First Lieutenant

Manager, Director, Executive: 1993 to Present



## Ft. Benning, GA 1989



24 of 50

SERVICE SCHOOL ACADEMIC EVALUATION REPORT					
For use of this form, see AR 623-1; the proponent agency is MILPERCEN					28 Mar 90
1. LAST NAME—FIRST NAME—MIDDLE INITIAL	2. GRADE	3. BRANCH	4. SPECIALTY/MOSC	5. COMPONENT	
KASZUBA, JOHN	2LT	CH	74A	A	
6. COURSE TITLE			7. NAME OF SCHOOL		
CHEMICAL OFFICER BASIC COURSE 501-90			U.S. ARMY CHEMICAL SCHOOL FT MCLELLAN, ALABAMA 36205-5020		
<p>10. COMMENTS (This item is intended to obtain a word picture of each student that will accurately and completely portray academic performance, intellectual qualities, and communication skills and abilities. The narrative should also discuss broader aspects of the student's potential leadership capabilities, moral and overall professional qualities. In particular, comments should be made if the student failed to respond to recommendations for improving academic or personal affairs.)</p> <p>2LT Kaszuba is a very professional, assertive officer with outstanding potential for advancement. [REDACTED] high levels of initiative, self motivation, standards, [REDACTED] designated an HONOR GRADUATE of this course. He demonstrated superior judgment, sound organization, and an ability to work well with others in both garrison and tactical leadership positions. [REDACTED].</p> <p>He should be assigned as a platoon leader at the earliest possible date. 2LT Kaszuba will excel in any assignment. He should be considered for promotion and advanced schooling ahead of his contemporaries.</p>					

Unleash Your Leadership Potential  
Beat the Odds!

# A Leader/Manager Reality

Shift from what is only good for me to what is good for my team.

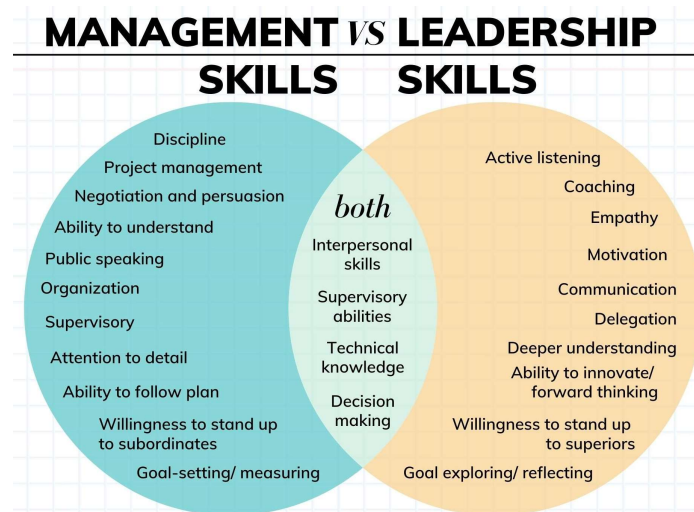
You must now:

- Think like a leader.
- Make sure everyone's work gets done.
- Pay attention to the needs of your employees and upper management.

New reality:

- You're judged on your performance and decision making, and also on your ability to inspire your employees to achieve.
- Find the balance between "being the boss" and maintaining positive relationships with EACH of your employees: it takes thoughtfulness, extra hours, and a desire/passion to give of yourself.

Success = 1<sup>st</sup> Lead & Manage 2<sup>nd</sup>



Leadership is about people.  
It is not about organizations.  
It is not about strategies.  
It is ALL about people-motivating to get the job done.  
You have to be people-centered.



COLIN POWELL

1937-2021

## Leaders have

the courage to act differently,  
humility, knowing that they may not always be right,  
a service-first philosophy,  
the confidence to trust their intuition,  
plenty of self-motivation.

# Key Skills to Earn Trust & Respect

**PERFORMANCE DURING THIS RATING PERIOD. REFER TO PART II, DA FORM 67-8 AND PART III, DA FORM 67-8-1.**

☒ **ADVERSELY EFFECTED** ☐ **USUALLY EXCEEDED** ☐ **USUALLY FAILED**

**REMARKS TO OFFICER/ASPECTS OF THE PERFORMANCE. REFER TO PART II, DA FORM 67-8 AND PART III, DA FORM 67-8-1. DO NOT USE FOR COMMENTS ON POTENTIAL.**

[REDACTED]

1LT Kaszuba is a solid leader, a super trainer, and an officer that can always be counted on. Soldiers need leaders like 1LT Kaszuba.

**THIS OFFICER'S POTENTIAL FOR PROMOTION TO THE NEXT HIGHER GRADE IS:**

☒ **COMPLETELY ADEQUATE** ☐ **POSSIBLY ADEQUATE** ☐ **DO NOT PROMOTE** ☐ **OTHER (Specify below)**

**COMMENT ON POTENTIAL:**

Unlimited potential. 1LT Kaszuba should remain with troops. Capable of commanding a company now. Can handle any battalion level staff position the Army has to offer.

**PART VII - RECOMMENDATION**

**COMMENTS:**

1LT Kaszuba is one of the most outstanding young officers I have ever known. His professionalism, drive, and attention to detail are unsurpassed by his peers.

John Kaszuba can accomplish any task assigned and has unlimited potential. Promote immediately and select early for command.

**PERFORMANCE DURING THIS RATING PERIOD. REFER TO PART II, DA FORM 67-8 AND PART III, DA FORM 67-8-1.**

☒ **ADVERSELY EFFECTED** ☐ **USUALLY EXCEEDED** ☐ **USUALLY FAILED**

**REMARKS TO OFFICER/ASPECTS OF THE PERFORMANCE. REFER TO PART II, DA FORM 67-8 AND PART III, DA FORM 67-8-1. DO NOT USE FOR COMMENTS ON POTENTIAL.**

[REDACTED]

every assigned and implied task with the confidence and ease of a senior CPT. An outstanding performance by an officer of exceptional ability and talent.

**THIS OFFICER'S POTENTIAL FOR PROMOTION TO THE NEXT HIGHER GRADE IS:**

☒ **COMPLETELY ADEQUATE** ☐ **POSSIBLY ADEQUATE** ☐ **DO NOT PROMOTE** ☐ **OTHER (Specify below)**

**COMMENT ON POTENTIAL:**

Outstanding potential. Thrives on responsibility and excels with each challenge. Promote to CPT and select for Advance Civil schooling immediately.

(a.2) An extremely well read officer with a firm grasp of concepts and operations.

(a.7) Writing ability is well above his peers.

(b.1,2) Possesses a dedication to duty that guarantees mission accomplishment; Constantly seeks additional responsibilities.

(b.4,5) His exceptional self-discipline distinguishes him from his peers and his integrity is above reproach.

**PART VII - RECOMMENDATION**

**COMMENTS:**

[REDACTED] His work is complete, accurate and of a quality normally found in Captains who are CMSG graduates.

4. PERFORMANCE DURING THIS RATING PERIOD. REFER TO PART III, DA FORM 87-2 AND PART III A, AND 4. DA FORM 87-2-1

☒ ALWAYS EXCEEDED REQUIREMENTS ☐ USUALLY EXCEEDED REQUIREMENTS ☐ MET REQUIREMENTS ☐ OPEN FAILED REQUIREMENTS ☐ USUALLY FAILED REQUIREMENTS

5. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE. REFER TO PART III, DA FORM 87-2 AND PART III A, AND 4. DA FORM 87-2-1. DO NOT USE FOR COMMENTS ON POTENTIAL

...to properly  
 LT Kaszuba is  
 totally dedicated to mission accomplishment and taking care of soldiers. He  
 is a total team player whose professionalism and caring attitude



(a.7,14) clear and precise written and oral communication skills

(a.1) quickly grasp new concepts

(b.6) maintains the moral courage to stand up for what is right

## Communication

91% of employees think their managers are not good communicators.

*Interact-Harris*



## Become A Good Communicator

First, be a great listener.

- Many managers are poor listeners and tend to enjoy talking, more than they should.
- Effective communication is a two-way process. Your ability to lead others will quickly improve once you learn how to be a better listener.

Communicate x3.

- In real-time, frequently and be specific.
- In a way that is truthful, open, honest and transparent.

Be approachable, personal and authentic.

- The more personal, authentic and engaging conversation is, the more employees will trust.
- Make your team feel like they can speak up and engage in daily conversations.
- Make communication more relevant and engaging to your team.

Communication is one of the hardest to master.

- Speaking to people in certain situations: motivating, etc.
- Having difficult conversations with others.
- Writing meaningful emails.
- Running effective meetings.
- Story telling.

So much of our day-to-day success hinges on the ability to successfully communicate.

## Make Your Team Feel Heard & Validated

- Start with a session to ask your team for input on the best way to move forward.
- Be clear that you will make the final decision after you weigh their valuable advice.
- When people feel heard and validated, they're more likely to buy in, even if your decision it's not what they would chose.

## Communicate Openly

Relay information as you communicate with senior management.

Communicating with your team about management decisions and strategic plans can help employees better understand their priorities and boost their motivation to accomplish objectives.

Outline larger goals for your team and collaborate on setting team objectives that influence greater success.

*"I don't gripe to you, Reiben. I'm a captain. There's a chain of command. Gripes go up, not down. Always up. You gripe to me, I gripe to my superior officer, so on, so on, and so on. I don't gripe to you. I don't gripe in front of you. You should know that as a Ranger."* [Captain Miller, Saving Private Ryan](#)

## Constructive Criticism

- Read up and practice how best to provide constructive criticism.
- Never give critical feedback on people's emotions. Instead, focus on behavior and impact.
- It may be tempting to only give positive feedback out of fear that you'll offend your employee or make them NOT like you, but this will actually harm rather than help.
- It can be difficult to tell an employee that they are doing something wrong/not up to your standards, but it will **help that person** BE BETTER and they just might be thankful for it.
- The reality is that you should give out much more positive feedback than you are negative feedback for one simple reason: **Positive feedback is significantly more motivating** than critical feedback.

## Constructive Criticism

- Your job is to make your people successful.
- At the end of the day, you will be judged based on the success of your team. That means that they are your first priority.
- Most employees are doing most things right on any day, but they usually get feedback when they are doing wrong. If you're consistently looking for reasons to offer praise, even with the little things, that will keep your team in the right headspace to give it their best.
- Study up on how best to articulate your wants, needs, and frustrations to your team. And don't forget to tell people what they're doing well and to thank them for their hard work!
- It may be helpful at the end of every day to list the ways you set your employees up for success. It will help you to take stock, hold yourself accountable, and make sure you are focusing on the things that matter most.

## Circulate

Few actions prove as eye-opening to a new manager as getting away from the computer screen and out into the main workspace.

- **Simply observe.** What is the layout of the office? What are people doing? How do they interact with one another?
- **Ask questions.** People take pride in sharing their expertise. What do staff have to say about their tasks and how they are done?
- **Evaluate the vibe.** You can learn a great deal about the general mood. Is the place eerily silent? Does it buzz with excitement? Do staff appear stressed out?
- **Engage in random chats.** Your presence may lead some employees to spontaneously strike up a conversation. Go with the flow.

## Managing Up

Managing up involves being helpful, anticipating your boss' needs, and knowing how to discuss problems so you can work through them together.

- Understand their communication and decision-making styles
  - Allows you to make better use of their limited time and attention.
- Align yourself with their goals
  - Helps you to anticipate the needs and challenges associated with those goals, and help to achieve them.
- Help them stay up-to-date
  - Keep them in the loop about issues or concerns related to any project or initiative that they are engaged in.
- Become a trusted source of information and help
  - Be someone who they know they can turn to when an issue arises.

# Emotional Intelligence

## Develop Your Emotional Intelligence

- Emotional intelligence is the skill to identify and manage your emotions and the emotions of others.
- These skills include five key tenets: self-awareness, self-regulation, motivation, empathy, and social skills.
- It's critical to develop these skills to effectively lead a team filled with varying (and sometimes opposing) personality types.
- Good emotional intelligence enhances communication.
- Workplace conflict happens, and if egos clash and tensions rise, how well will you handle it? You are responsible for developing a workplace that is/feels positive and safe,... or toxic.

## Building Trust



## Actions that Encourage Trust

- **Keep your word.** Team members will think you merely "talk big" and won't take what you say seriously going forward. Do not overpromise or overreact.
- **Be a good role model.** Live/display the behaviors and attitudes you wish to see in others. Keep your commitments, have integrity, be ethical, don't lose your temper and never yell at staff.
- **Avoid micromanaging.** No one enjoys a new manager peering over their shoulder. It comes across that you do not consider the individual competent and are waiting for failure. Instead, check in with team members regularly, and encourage them to seek you out as needed.
- **Admit mistakes.** If you don't assume responsibility for yours, don't expect others to. Create an environment of accountability where people learn from what they do wrong.
- **Ask for feedback.** Send the message that you value the opinions of others. Promotes the idea that everyone has a voice that should to be heard.
- **Recognize and appreciate others.** Workers want you to notice what they do, especially when they go above and beyond their job description.
- **Share credit.** Spread the glory! Others will feel leery to put forth their best work again if they feel slighted.
- **Never play favorites.** Trust diminishes when a manager fails to hold everyone to the same standards. Remain fair and impartial, even if you are friends with some colleagues from the days before becoming a manager.
- **Maintain an open door.** Be open to discussing any subject team members have on their minds. You'll gain a reputation as a leader who hears people out and thoughtfully addresses concerns.

## Be Consistent

- If you **constantly** flip-flop on decisions or how you make decisions,
  - Your team will start to lose trust in your ability to lead.
  - They will question if you are making informed judgments, leading with emotion or worse – you are unprepared to handle your new responsibility.
- To be consistent you need to be patient. Take your time.
- Don't make a decision in the moment just because people are pushing you to do so. Think things through.
  - Write up emails and step away then review before you send them. This can be very hard for people at every level but sometimes the best thing you can do is make the time to do it right.

## Self-Manage

## Learn How to Self-Manage

- Leading others requires being able to manage your own time well. If you procrastinate, then your whole team will fall behind.
- Use time management strategies and delegate responsibilities to your team when it's appropriate and necessary to do so.

**Delegate**



## Delegating

- Leaders empower their team and in turn create more velocity by expanding on the work just one person could do.
- Never put your own responsibilities on someone else's plate.
- Assess your delegation practices and challenges.
- Recognizing what can and can't be delegated.
- Practice delegation discussions.
- When you need someone to step up and lead on your behalf, be clear on your expectations but also stress to them how important the opportunity is for them personally. When they know how important their role is they will feel even greater ownership towards ensuring an optimal outcome and their contributions will feel even more valuable.

## Allow People to Make Mistakes (within reason)

- Your team's ability will stagnate and remain limited if you don't enable employees to take risks and try new things.
- If you need team members to grow fast, it's not going to happen if they're playing it 100% safe.
- If you want your employees to take risks, you must create a totally different paradigm for fear and failure.
- Your team must trust that high performance involves being comfortable with taking risks and failing *into* success; that failure is a part of the growth and success equation.
- Nobody gets it right every single time unless they are doing exactly the same things in the same ways. That's a pattern of stagnation.
- You have their back 100%.

## Don't Under Supervise

- New leader-managers can give too little supervision because:
  - Lack of experience, or fear of appearing bossy.
  - They don't wish to alienate friends and colleagues they now manage.
- Stay on top of projects so they run smoothly.
- Give staff sufficient authority, autonomy, and resources, based on their skill levels and experience.
- Instead of relying on formal authority to get what you want from your team, exercise influence by creating a culture of inquiry. Your subordinates will be more committed to the team's goals because they are empowered, not ordered, to achieve them.
  - The result is a team/department in which people feel empowered, committed, and accountable for fulfilling the organization's vision.
  - Make sure everyone is 100% clear on what is being discussed.
  - Once you have the information and knew what the team is doing, be consistent.
  - Say, You told me X; why are you doing Y? I'm confused. Don't demand that people do things your way.

## In Summary

1. Be a good human
2. Treat team members as individuals.
3. Know your stuff.
4. Do what you say you are going to do.
5. Routinely communicate your intent, priorities and expectations.

## In Summary

6. You are liable for other people's performance.
7. Others depend on you for growth and success.
8. You are required to give feedback.
9. Meeting metrics becomes your responsibility.
10. Actively watching out for your team is a daily duty.

*Leading and building a great team and watching it succeed is an **extremely rewarding** experience.*

## Success Planning Resources

- Tips on Overcoming Your Predecessor's Legacy
- Your First 90 Days
- Leadership Development Plan Template



## Tips on Overcoming Your Predecessor's Legacy

## Remind Employees that Change Can Be Good

### Get the inside scoop

- Before your first day, find out what's going on from your hiring manager so you have some sense of what you're getting into, and it will help you set up your strategy to approach the situation. Gather the circumstances for the vacancy: was someone fired or promoted?

### First impressions are important

- Was there great loyalty to your predecessor?
- Spend a lot of time getting to know your new team, so they can also get to know you.
- Set up a "meet and greet" early on and talk about your style and what they can expect from you as their new manager. Ask questions. Share your vision for the future.

## Remind Employees that Change Can Be Good

- Ask employees where they are frustrated, or how they think the team can be better.
  - Ask for candid feedback. Once you've collected the information, you will be able to draw themes.
- Don't be afraid to communicate that this is a new time of opportunity for the team.
  - Talk about the future, and where you see the team is going.
  - Highlight some of those themes and your plans for your team.
  - Establish your own standards and expectations, then communicate them.

## Establish Expectations

- Establish Your Own Expectations.
  - Avoid using generic statements like "I expect hard work" and "We are going to have a culture of accountability." Instead, tell your employees something they haven't heard before.
  - Team interaction and responsibility, meeting etiquette, standard working hours and promptness, respect for one another, communication preferences, professionalism and attire.
  - Address specific examples that may have occurred in the past few weeks.
- Show You Mean Business... Quickly
  - If you have a situation where you need to recalibrate expectations left by your predecessor, you need to reinforce your decisions and stand firm on matters of team policy.
  - Reinforce your expectations early on and establish yourself as an authority to your employees. Reinforcing your policies and setting expectations quickly tells your employees that you mean business, and this will help you overcome the legacy of your predecessor.
  - Does this mean you should descend on the department like a FBI Agent and intimidate everyone on your first day? Absolutely not.

## Assess Your Team (Three Areas)

1. Level of Accountability
  - Most important.
  - Evaluate the level of accountability your employees demonstrate.
    - Do they meet their commitments? Do they stay on task? Are they reliable?
2. Sense of Urgency
  - What is the inherent sense of urgency that employees share. Is there a general buzz about the office, or are the employees a little too relaxed for your taste?
  - High productivity is the result of drive and motivation. To achieve the results you are expected, you will need to instill a sense of urgency among your employees.
  - Gaining an early understanding about the level of urgency within your organization will help you make quick changes and break old habits if necessary.

## Assess Your Team (Three Areas)

### 3. Office and Work Conditions

- Evaluate the work conditions of your team that were created (or tolerated) under your predecessor's watch.
  - How important was the work environment? Is the office clean, organized and well-taken care of? Do people demonstrate a sense of pride?
- The work environment can indicate how your predecessor treated and motivated employees.
- Why do work conditions matter? The environment your employees are accustomed to indicates the level of expectations your employees will have of you.
- If your employees are provided with top-of-the-line equipment despite a financially struggling business, for instance, you may want to recalibrate their expectations. If the infrastructure is poor and equipment dated, you may be able to make an initial impression on the team by investing in improvements to their work environment.

## First 90 Days

## Think About How You Want To Lead

- The promotion doesn't make you a leader; successfully leading makes you a leader.
- Mentally prepare yourself for a six-month transition.
- Think on the differences, challenges, and opportunities involved in leading/managing others.
- Dedicate time to think about how you want to lead.
- Develop a personal leadership plan.
- Get advice from as many trusted advisors as you can.
- Be mindful that conflict will arise (address it quickly).

## Loyalties

- You may now feel more loyal toward the organization. Its natural.
- That doesn't mean to be less loyal to your team. You have an equal obligation to both.
- You must recognize team members' needs and advocate for their well-being and development.
- Employees will respect you and work harder for you if they genuinely believe you have their best interests at heart and care about them and their career.



# Check-In Meetings with Your Manager

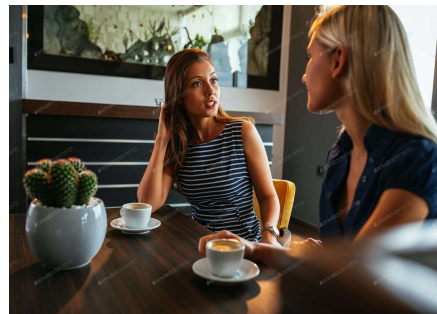
## First Meeting

- Acknowledge that leadership is more demanding than anticipated and that there is a gap between your current capabilities and the requirements of the new position.
- You are responsible for setting and implementing an agenda for a whole group, something for which your career hasn't prepared you for.
- Ask your manager to:
  - Clearly outline the purpose, key objectives, and parameters for your new role.
  - Discuss corporate strategy, your specific department's role in supporting that strategy, and critical goals, objectives, and target metrics.
  - Clearly define the targets and results you will be accountable for.
  - Summarize the work to be done and how you/your team will be measured for success.
- Set up meetings to update them on projects and goals, and ask for their advice on issues or tasks that you may be unsure how to handle.

# Check-In Meetings with Your Staff



VS



## Check-In Meeting Rules

Respect the time.

- The most important part of the one-on-one is actually having it. Keep the time as an unmovable, and always show up on time.

Make it a safe place to share concerns.

- Employees should feel like their one-on-one are a safe place to speak freely. They should never be afraid to ask a question or share concerns.
- Be honest - when you don't know, you don't know. Acknowledge their request and make a commitment to finding the right answer and follow up with accurate information
- The worst thing you can do is lie or set inaccurate expectations.

Be a coach, not a dictator.

- Spend more time listening and less time talking. When your employee is stuck and looking for a solution, don't just jump in with the answer. Help them determine the right outcome and coach them. Ask questions that guide.
- They will be far more vested in the solution because they will feel like they truly had a hand in its development. You are teaching them important skills for the next time a problem arises.

## Check-In Meeting Rules

Ask what YOU can do better.

- Demonstrate your own self-awareness and find out what you can do better. If you are managing multiple people, you will find they all have different styles and personalities. You need to have some chameleon like qualities so you can get the best out of them. By understanding what you can specifically do for them, the easier it will be to have a strong working relationship.

Remove barriers for them.

- This is about getting the best from your employee. Help them understand their path to success and clear the road of obstacles before they get there, the result is often a more efficient and productive employee.

Make their career development a priority.

- Have regular conversations around career development.
- What do they really want to do as their career matures?
- Do they have the right mentors?
- Are they working on the right projects?

## Check-In Meeting Rules

Leave your laptop and phone at your desk.

- When you have a conversation, then be present. Don't bring your laptop unless you are using it collaboratively.
- This actively tells the employee that they are important.
- Giving part-time attention gets you part-time results. Thirty minutes of quality, laptops-closed time is not too much for anyone to ask for.

End on a positive note.

- Even when you are having a tough one-on-one and the news you deliver is not good, don't underestimate the power of ending on a positive note.
- You can get people from good to great if you are able to keep them motivated and operating with an optimistic and positive frame of mind.

## First Check-In Meetings

Have a personal conversation with each direct report that does the following:

- Schedule for 1 hour.
- Acknowledge the awkwardness. You got the job rather than friends and colleagues.
- Banish fear and proactively initiate conversation.
  - If you are fearful, your peers will be too.
  - You have built prior relationships, so the top question is, "What does this promotion mean to those relationships?"
  - It is important to set expectations around the nonnegotiable that the new working relationship entails.
- Ask employees for a brief introduction of themselves. Get to know their educational background, their professional experience, as well as the tasks and projects they are actively working on.
- Show that you value team members and their strengths.
  - Explain the roles clearly, reiterate that you value them for the strengths they bring to the table - perhaps those that are complementary to yours - and explain how you look to embrace an inclusive and collective leadership style for the benefit of the team.

## First Check-In Meetings

- Open the door for them to speak up if and when things feel “off” in the future.
- Share what they can expect in the near-term:
  - Check-in meetings, etc.
  - Your communication style and preferences.
  - Expectations of them individually and the team:
    - Ethics, integrity, team collaboration, commitments, professionalism, communication style (when to use meetings, email, phone, chat), engaging with customers or suppliers, working hours (breaks, attendance), etc.
- Ask for their support.
- Schedule follow-up meetings at least once per month in order to maintain regular face time with your staff.

### Benefits

- Sends a clear signal that you take personal interest in each employee.
- Getting results through your team will rely on your knowledge of each individual's skills, talents, motivations, and abilities.
- Keeps you informed of what's really going on.

## Develop Team and Individual Goals

### Individual Goals

- Work with each team member to set personal goals that help them stay motivated, productive, and successful in their roles.

### Team Goals

- Establish goals that benefit the organization.
- Collaborate to establish one or two long-term goals and short-term objectives and responsibilities.
- Remind your team that you are in this together, working toward a common goal, and attaining that goal is a win for everyone.
- Leadership Support
  - Ask; what will you say that I did?
  - Translate the input and document it with the team responsibility outlines. Ask team members to hold you accountable.

## Schedule Regular Feedback Sessions

Schedule check-in and team meetings to keep everyone on track and up-to-date on performance and productivity.

- Regular evaluation and feedback sessions help employees get better at their jobs.
- Regular feedback and performance monitoring provides valuable insight into your own effectiveness as a manager and strategies for your own improvement.
- Performance conversation:
  - What's working?
  - What's not?
  - What must be done differently?

## Behaviors To Avoid. Don't:

- Adopt a "DIY" mentality.
- Blame others before blaming yourself.
- Fail to realize that leading is about influence, not power.
- Command instead of communicate.
- Be too Serious... or not serious enough.
- Ignore performance issues.
- Fail (being afraid) to give critical feedback.
- Manage tasks before careers.
- Forget that employees are people.

## Success Planning Tool #1

### Create a Leadership Development Plan (LDP)

#### Master Core Skills

- Identify the new responsibilities specific to being a leader and supervisor/manager:
  - Running meetings, providing feedback, sharing information in front of groups, and personnel decisions.
- Identify any new skills needed or need to be enhanced.
- Learn these skills.
  - Who do you know that has these skills? Ask if you can shadow them or practice with them.
  - Look for external resources that will help you build these skills.

Create a LDP

## Close Experience Gaps

- There will be a number of "strategic" responsibilities that you can expect to take on. These can include:
  - Starting a new project.
  - Turning around a project that is not going well.
  - Leading larger and more mission-critical projects.
  - Leading in a crisis.
- Identify knowledge, skills, and resources/relationships, needed to be successful.
- Develop a plan to gain the necessary experience.

Create a LDP

## Build Relationships

- As a leader-manager, you will interact with other "stakeholders" on regular basis:
  - Within your organization: department heads, front-line employees, and managers with different skill sets but similar tenure.
  - Outside your organization: vendors/suppliers, other members of the business community.
- Identify those stakeholders with whom you'd like to have a stronger, mutually beneficial relationship.
- Reach out to start the conversation.

Create a LDP

## Delegate Tasks

- Strike a balance between day-to-day tasks and longer-term responsibilities.
- List the activities that are critical to your professional development, along with the activities that your team are capable of completing.
- Focus on the work that is most closely aligned with your expertise and development... and trust your team with everything else, WHILE ensuring that tasks/projects are not delayed and that your team remains engaged.

Create a LDP

## Action Items

- Include strengths and growth areas in your plan.
- List each area where you see potential to improve skills.
  - Include an action item, the timeframe in which you want to complete the task, and the cost (in time and/or money).
- Action items:
  - Meeting with a mentor or successful leader/manager.
  - Reading a book on leadership.
  - Completing a leadership assessment.
  - Identifying training or educational opportunities.

Create a LDP



## Action Items

- Seek feedback.
  - [Talk to your team and your peers](#) about how well you are growing as a leader and where you can continue to make improvements.
  - Seek [feedback from others](#) you don't typically interact with: divisions within your organization or third-party partners. They can provide different insights than those who you work with regularly.
- Take time to reflect.
  - Leaders have a great deal of responsibility to juggle.
  - Schedule 15 minutes every morning to [assess](#) the most important tasks for the day and 15 minutes in the evening to [reflect](#) on what went well and what could have been improved.

Create a LDP

## Establish Success KPIs

- You will be assessed both on your performance and on the success of your team.
- Your plan should include the critical indicators for your success and that of your team
- Including:
  - Increasing delegation of responsibility.
  - Strategic planning and preparation.
  - Improving the quality of work.
  - Improving teamwork and morale.
  - Continuous learning for you and your team.
  - Recognizing the team's contributions.

Create a LDP

*Thank You!*



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