Management and Leadership Skills for First-Time Supervisors and Managers

PARTICIPANT WORKBOOK

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Leadership Fundamentals and Issues All New Managers Face

> "Having a plan will not ensure your success, but without a plan you're sure to fail."
>
> — Dwight David Eisenhower

Management is not an easy job, especially when it's your first time officially leading others. Whereas before you had only yourself to worry about, now you're responsible for your employees' professional development and success as well as your own.

In this course, you'll get a taste of many different aspects of supervising others. You'll take a high-level look at common mistakes new supervisors make, the boss-employee dynamic, how to build trust and respect while establishing your authority, how to communicate effectively, and how to motivate employees — among other skills.

Your new role brings with it a different set of expectations and a level of accountability for which you might not feel prepared. But by using the supervision strategies you learn in this course, you'll soon be as successful in your new role as you were in your last.

Learning objectives

By the end of this session, you'll be better able to:

- Discover the challenges facing leadership today.

- Acquire a supervisor's mindset and image.

- Prevent the problems that develop when supervising friends and co-workers.

- Recognize and avoid the most common mistakes even seasoned managers make.

Common Leadership Challenges

1700   1800   1900   **Today**
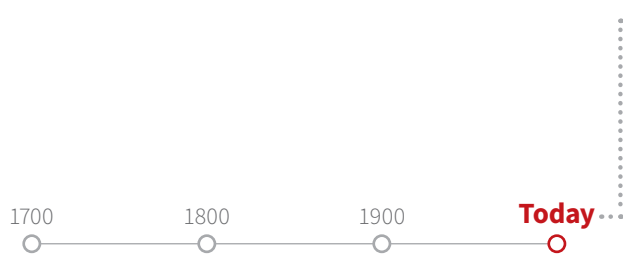
Challenges:

1. Creating a culture of trust and respect in the midst of diversity

2. Understanding and adapting to various communication styles, both face-to-face and virtual

3. Developing and supervising remote employees

4. Obtaining meaningful organizational direction

5. Involving team members in decision making

EXERCISE

What are your greatest leadership challenges?

Leadership Style Assessment

EXERCISE

(1) = Strongly disagree   (2) = Disagree   (3) = Agree   (4) = Strongly agree

1. Almost anyone could probably improve job performance quite a bit if they really wanted to.　　(1)　(2)　(3)　(4)

2. It's unrealistic to expect people to show the same enthusiasm for work as for leisure activities.　　(1)　(2)　(3)　(4)

3. Even when given encouragement by their supervisor, very few people show the desire to improve themselves on the job.　　(1)　(2)　(3)　(4)

4. If you give people enough money, they are less likely to care about status or recognition.　　(1)　(2)　(3)　(4)

5. When people talk about wanting more responsibility, they really want more money or status.　　(1)　(2)　(3)　(4)

6. Since most people don't like to make decisions on their own, it is hard to get them to assume more responsibility.　　(1)　(2)　(3)　(4)

7. Being tough with people will usually get them to do what you want.　　(1)　(2)　(3)　(4)

8. A good way to get people to do more work is to crack down on them once in a while.　　(1)　(2)　(3)　(4)

9. It weakens a manager's prestige whenever they have to admit that a subordinate was right and they were wrong.　　(1)　(2)　(3)　(4)

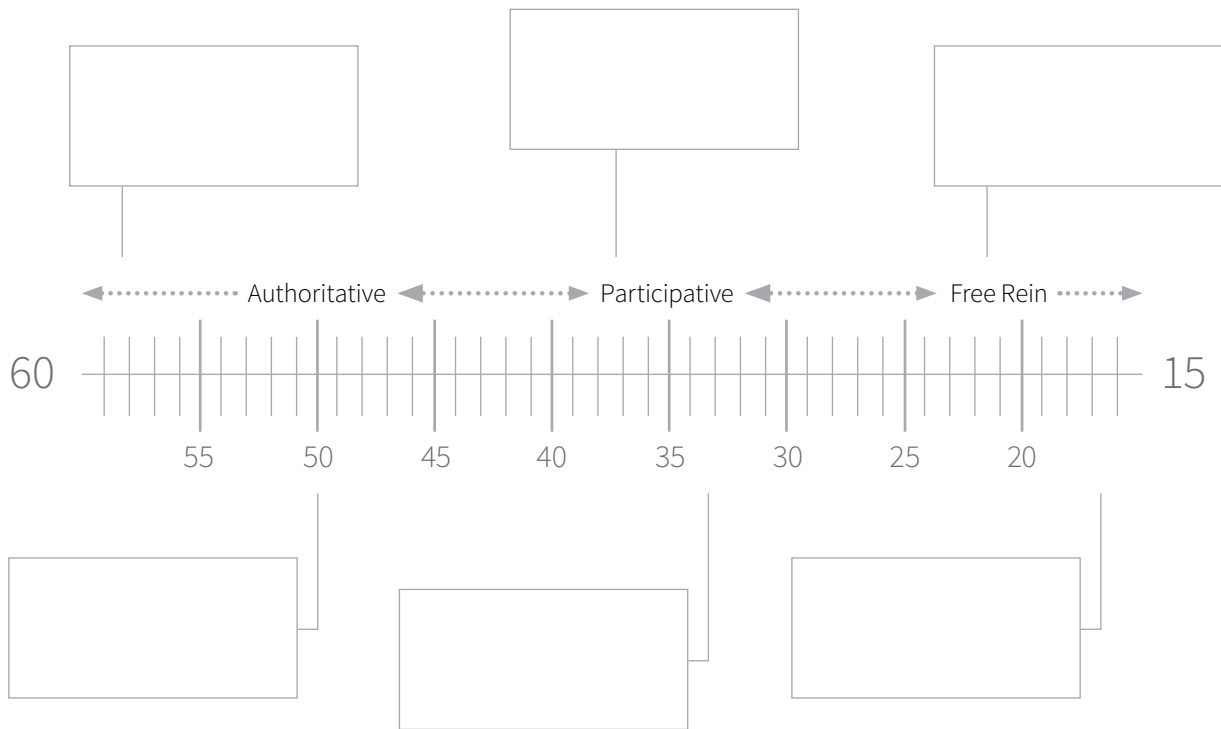10. The most effective supervisor is one who gets results regardless of methods used handling people.　　(1)　(2)　(3)　(4)

11. It is too much to think that people will do a good job without being prodded by their supervisor.　　(1)　(2)　(3)　(4)

12.	A manager who expects people to set their own standards for superior performance will probably find that they don't set them very high.	① ② ③ ④
13.	If people don't use much imagination or ingenuity on the job, it is probably because relatively few people have much of either.	① ② ③ ④
14.	One problem in asking for the ideas of subordinates is that their perspective is a little too limited for their suggestions to be of much practical value.	① ② ③ ④
15.	It is only human nature for people to do as little work as they can get away with.	① ② ③ ④

TOTAL _____

Once you've completed the assessment, total up your responses. Place an "X" at the corresponding point on the continuum at the top of the next page. This marks your personal, preferred leadership style.

Leadership and Management Styles

```
                     ┌──────────┐         ┌──────────┐
┌──────────┐         │          │         │          │
│          │         │          │         │          │
│          │         └────┬─────┘         └──────────┘
└────┬─────┘              │                    │
     │                    │                    │

◄·······  Authoritative  ◄········  Participative  ◄········►  Free Rein  ·······►

60  |||||||||||||||||||||||||||||||||||||||||||||||||||||||  15

        55        50        45    40    35    30    25    20
```

EXERCISE

What are some differences between bosses and leaders?

Bosses:

Leaders:

Acquiring a Leader's Mindset and Image

1. Networking with experienced leaders you admire

2. Audiobooks and downloaded media turn your car into a classroom

3. Seminars, training events and webinars

4. Trade associations and industry meetings or events

5. Benchmark with other managers (outside of your industry)

6.

7.

8.

9.

10.

Remember: Leadership is a:
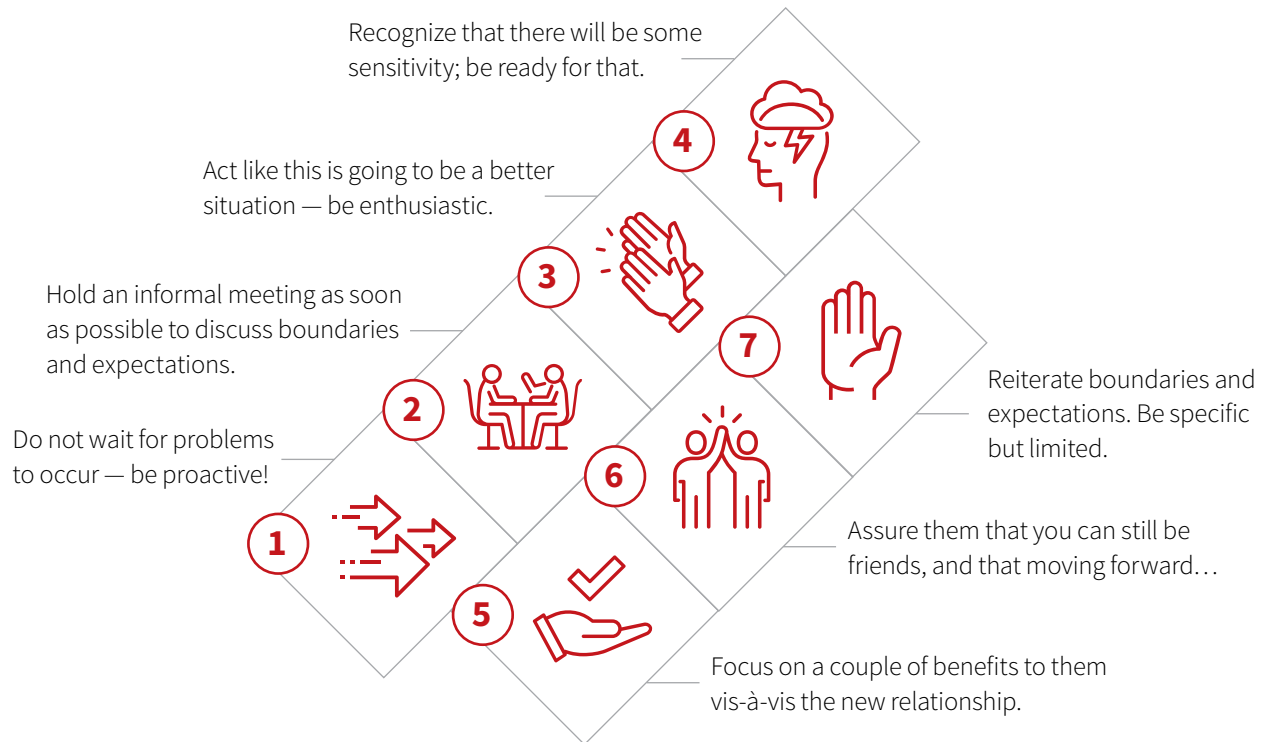
The one thing needed to be a leader:

EXERCISE

Think about the best and the worst boss you've ever had. In the space provided, list the characteristics of each.

Worst

Best

Tips for Supervising Friends and Former Co-Workers

Though not impossible, it is very difficult to be a close friend and supervise at the same time. With regard to those employees with whom you have an especially close relationship:

Recognize that there will be some sensitivity; be ready for that.

4

Act like this is going to be a better situation — be enthusiastic.

3

Hold an informal meeting as soon as possible to discuss boundaries and expectations.

7

Reiterate boundaries and expectations. Be specific but limited.

2

Do not wait for problems to occur — be proactive!

1

6

Assure them that you can still be friends, and that moving forward…

5

Focus on a couple of benefits to them vis-à-vis the new relationship.

With regard to the rest of the team:

✓ Remain open and friendly without being one of the crowd.

✓ Be wary of revealing negative feelings about other people. It's called: _____

✓ If counseling becomes necessary, focus on tasks, events and activities.

To be an excellent, highly successful leader, you must:

Turn your _____ into _____ .

Common Mistakes

12 COMMON MISTAKES		**HOW TO AVOID THEM**
1 Failing to clarify expectations	· · · · ·	
2 Not properly training your staff	· · · · ·	
3 Forgetting the importance of documentation	· · · · ·	
4 Unilaterally making all the decisions	· · · · ·	
5 Resisting delegation	· · · · ·	
6 Trying to fix all the problems at one time	· · · · ·	
7 Not giving employees authority and/or support	· · · · ·	
8 Working without clear expectations	· · · · ·	
9 Being afraid to take a risk and change things	· · · · ·	
10 Failing to supervise	· · · · ·	
11 Failing to hire people who are more talented than you are	· · · · ·	
12 Not learning how to be an effective manager	· · · · ·	

Conclusion

Being a new supervisor is intimidating. Your team's success — or failure — sits firmly on your shoulders. But any time you feel insecure, remember that you were promoted for a reason. Your boss believes in you, and now that you have some new knowledge and skills under your belt, you're better prepared to help your employees succeed.

Communication Techniques Every Leader Should Know

> "Great leaders communicate and great communicators lead."
>
> — Simon Sinek, author of *Start with Why*

To inspire your team to do excellent work, you need excellent communication skills. By communicating effectively with your staff, you build trust, foster engagement and get the work done to your clear standards.

Some situations — and people! — are more challenging than others. When you're dealing with complainers or combative team members, your ability to stay calm and communicate professionally can make the difference between a collaborative work environment and an unhealthy one.

Learning objectives

By the end of this session, you'll be better able to:

- Give crystal clear directions.

- Ensure you always hear what's really being said with active listening skills.

- Stay calm and in control in every situation.

- Manage complainers or combative team members.

Communication Challenges

Improving your communication skills will pay huge dividends for you — dividends you may never be aware of. Managers with poor communication skills face the following challenges:

1. Employees don't keep them adequately informed.

2. Staff members are more argumentative and negative.

3. Subordinates are hesitant to accept responsibility.

4. Accountability becomes nearly impossible.

5. They create more work for themselves.

6. They have to repeat directions over and over.

7. They may run into the dangerous characteristic of artificial agreement.

Five Steps to Giving Crystal-Clear Directions

State deadlines, standards, required formats, timelines, etc., as applicable.

Have them paraphrase your instructions.

Clearly define the project or task to be completed.

Explain the why of everything discussed with No. 2.

Provide adequate feedback early and often.

10 Pointers for More Effective Meetings

1. Define your purpose for calling the meeting.

2. Make sure the meeting is even necessary.

3. Anticipate and prepare accordingly.

4. Start on time; stick to the agenda. End early if you can.

5. To ensure participation, publish an agenda.

6. If you use an icebreaker, make sure it relates to the topic.

7. Use prework from employees whenever you can.

8. Involve each participant as much as you can.
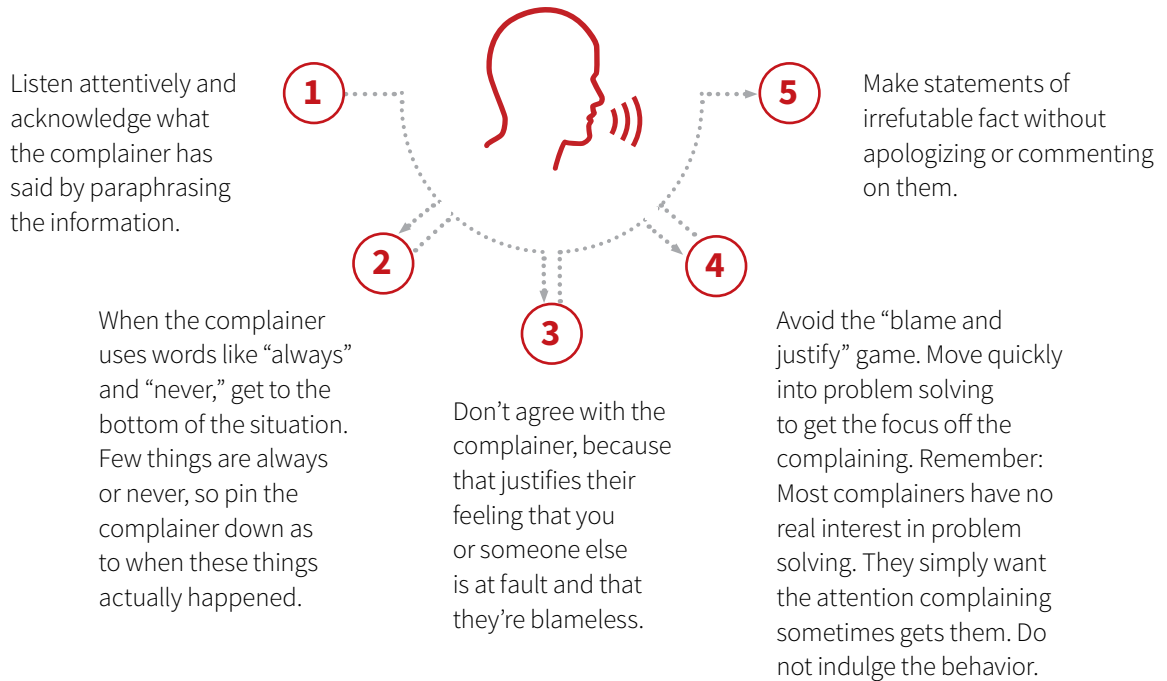
9. Create a follow-up plan.

10. Follow it!

Listening: Active Listening Techniques

ENSURE YOU'LL HEAR WHAT'S REALLY BEING SAID

1. Eliminate as many external distractions as you can — close the door, don't answer the phone, put your cell phone on vibrate or silent mode, close your laptop, turn off your video monitor, etc.

2. Eliminate as many internal distractions as you can. That means being aware of any "personal filters" you may have and controlling emotions.

3. Stay in the moment. Don't start to formulate your answers or try to anticipate what the speaker is going to say next.

4. Pay close attention to nonverbal clues like body language, tone of voice and facial expressions. And remember to give appropriate nonverbal indications of your interest as the message is received.

5. Keep in mind that this is a conversation, not a contest. Keep your ego in check.

6. If you start to lose understanding, ask clarifying questions.

7. Take notes when appropriate.

8. Do not respond with judgment. Avoid confrontational words and phrases like "That will never work" or "That's a crazy idea." Avoid personal attacks by minimizing the use of the words "you" and "yours."

9. Keep an open mind.

10. Use the reflective listening technique if you think you're not getting the whole story, to get further information or to buy yourself some time to formulate a response.

Steps for Coping With Complainers

1 Listen attentively and acknowledge what the complainer has said by paraphrasing the information.

2 When the complainer uses words like "always" and "never," get to the bottom of the situation. Few things are always or never, so pin the complainer down as to when these things actually happened.

3 Don't agree with the complainer, because that justifies their feeling that you or someone else is at fault and that they're blameless.

4 Avoid the "blame and justify" game. Move quickly into problem solving to get the focus off the complaining. Remember: Most complainers have no real interest in problem solving. They simply want the attention complaining sometimes gets them. Do not indulge the behavior.

5 Make statements of irrefutable fact without apologizing or commenting on them.

How to Stay Calm and in Control

- Use alpha breathing.
- Use positive self-talk.
- Take a drink of water.
- Change positions.
- Take a break and deal with it later.

Best Practices for Dealing With Argumentative and Combative People

- Remember: Arguing is a choice.

- Stay calm — keep it professional.

- Think before you speak. Take your time.

- If something insulting is said, repeat it word for word.

- Move to problem solving as quickly as you can.

- Do not feed the beast. Combative people usually feed off others, so remain as calm and cool as possible. That alone might calm them down.

Conclusion

Communication skills have a great impact on your ability to effectively lead your team. And the great news is that everyone can improve their communication skills. Each day, try to use the strategies you learned in this lesson to become an inspiring communicator. You might not see a difference overnight, but with consistency and practice, you'll be the supervisor who listens attentively, speaks confidently, gives clear directions and handles common attitude problems. Most importantly, your team will experience the difference, too!

Managing Your Time, Priorities and Projects

"The key is not to prioritize what's on your schedule, but to schedule your priorities."

— Dr. Stephen R. Covey
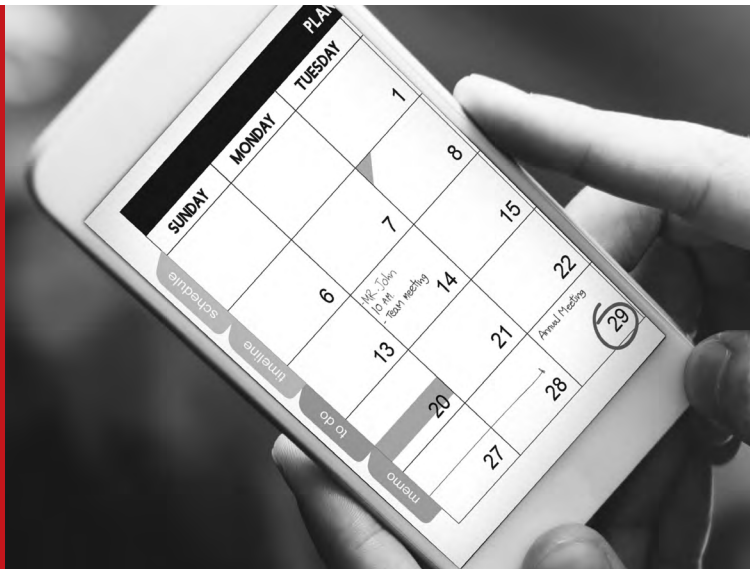
As a new supervisor or manager, you'll have multiple demands on your time and energy. You may be tempted to work longer hours and finish the work yourself, but that type of effort is not sustainable. To get the work done, you'll need to work smarter, not harder. You'll also need to call on the talents of your team.

In this session, you'll learn prioritization techniques to help you identify where you should focus your work. Then, you'll practice two strategies — saying "no" and delegating — to get some of that work off your desk. Finally, you'll pick up some tips to make the most of communication tools. You can't fit more hours in the day, but you can make the most of the hours you have.

Learning objectives

By the end of this session, you'll be better able to:

- Utilize prioritizing techniques when everything on your desk is urgent.
- Use email, text and voice mail to save time.
- Say "no" in a professional manner.
- Delegate more effectively.

80-20

> **Prioritize:** To arrange or do things in order based on particular criteria.

An easy-to-use prioritizing system

TASK	IMPORTANCE SCORE	IMMEDIACY SCORE	PRIORITY RATING
1. Submit payroll.	1	2	1
2. Complete annual report — due in three weeks.	6	10	8
3. Finish performance evaluations — due last week.	3	1	2
4. Return vendor inquiry call.	7	5	6
5. Send warranty information on printer to IT.	4	6	5
6. Schedule next month's team meeting.	9	8	9
7. Review notes for weekly 1-on-1 meetings.	5	4	4
8. Turn in invoices by the end of the week.	2	3	3
9. Meet with Editorial Department.	10	9	10
10. Assess team job status.	8	7	7

How to Say "No" Professionally and Effectively

| Say "no" right away. | Thank them for asking. | Explain why you said "no." | Offer alternatives, if possible. |

"Learn to say 'no' to the good so you can say 'yes' to the best."

— Dr. John C. Maxwell

Save Time Using Email, Text and Voice Mail With These 13 Tips and Techniques

1. Become an "expert" in the computer systems and programs you use.

2. When adding a new name to your contact lists, don't simply hit the "add contact" button. Take the time to type in all the contact information. This will save loads of time in the long run.

3. Create folders in your email system.

4. Create a VIP filter. Check that folder first thing every morning.

5. If possible, check your voice mail, text and email at set times during the day. Make others aware of your "schedule."

6. Announce when you normally check your messages during your outgoing messages — voice mail and email.

7. When you leave people a message, let them know when they will likely hear back from you.

8. Keep your spam email filter updated so a steady stream of junk mail doesn't constantly interrupt you.

9. Be disciplined! Unless you are expecting a very important message or call, stick to your schedule.

10. Use the "Reply to All" and "Bcc" functions wisely, not arbitrarily.

11. Keep your distribution lists trimmed down to only necessary recipients. Remember: "Do unto others …"

12. Have your name removed from distribution lists unless it is absolutely necessary for you to routinely receive information from that person or department.

13. Though it may take a little more time, never let the technological ease of text, email or voice mail prevent you from having meaningful one-on-one or face-to-face interaction — especially with your team members.

Strategies for Tracking Projects so Nothing Falls Through the Cracks

Use software such as Microsoft® Project. In lieu of that, use your project plan sheet as a guide.
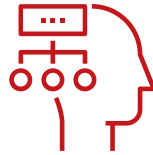
Consistently monitor the plan. Be willing to change and adapt as necessary.

Communicate necessary information consistently with your team members. Ask partners their preference for formats for reporting: Email, text/chat, voice mail, sticky notes, etc.

Be transparent. Let everyone know how and why information is being used. Give a little extra time and consideration to remote employees you don't see every day.

Check cost, time involved and performance of the project on a regular basis. Team members should be aware of these checkpoints and when and why they will occur.

Be a part of the team and part of the process if you can. After the project is finished, give feedback to all concerned parties. Be sure it is concise, including only necessary information.

Delegating Effectively With Your All-Star Team

- Allow team members to maximize their skills and abilities.

- Develop and grow yourself, your team members and your organization.

- Allow creativity to flourish.

- Enjoy a reputation as a professional, developmental manager.

- Position yourself for personal growth and promotion.

EXERCISE

If you delegate work to an employee, do you feel like you are passing the buck or shirking responsibility?	Yes	No
Do you spend more time on specific, step-by-step instructions than on big-picture communication?	Yes	No
During the delegation process, are you only available to employees at a specific time and place?	Yes	No
Do you stay late or come in early in order to play catch-up or get a head start on things more often than you like?	Yes	No
Do you take work home to do on your days off?	Yes	No
Does it feel like you have to constantly monitor your employees to have work completed to standards?	Yes	No
Do you hesitate to delegate work to your team members due to past failures or disappointment?	Yes	No
Is your day-to-day routine becoming so hectic that you have little time left for things like goal setting?	Yes	No
To get jobs done to an acceptable level, do you feel you have to give specific how-to instructions?	Yes	No

If an employee tries something new and fails miserably, will you issue a reprimand?	Yes	No
Do you see potential failure as another reason to not delegate?	Yes	No
Do you follow the adage: If you want a job done right, do it yourself?	Yes	No
Once a delegated task has been completed successfully, do you believe a financial reward is the most effective?	Yes	No
If a mistake occurs in the delegation process, are you quick to assign blame to the employee at fault?	Yes	No
Do you worry that delegated tasks might not be completed on time or to standards?	Yes	No
Since you are a member of management, do you expect to work longer hours than hourly staff?	Yes	No
In choosing which employee to delegate work, do you consider primarily seniority and experience?	Yes	No
Does confusion, lack of direction or low morale describe the nature of your work group?	Yes	No
Does your unfinished work seem to be increasing, while your finished work seems to be decreasing?	Yes	No
If employees encounter a problem, do you prefer for them to immediately come to you for assistance?	Yes	No

If the majority of your responses are "yes," you need to really hone your delegation skills.

Shining   Fallen
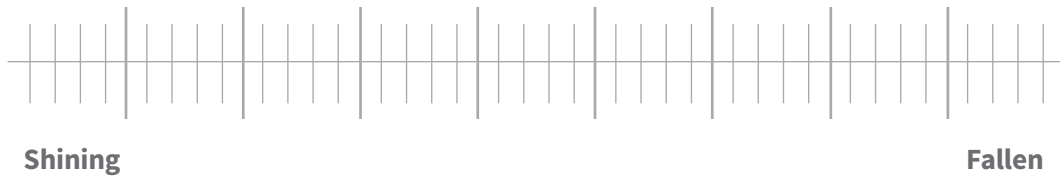
My first attempt:

Delegation

- Consider the team member's emotional bank account.

- Come to terms with why managers **GENERALLY** resist it.

- Come to terms with why you **PERSONALLY** resist it.

- Recognize why it's **IMPORTANT** to delegate. Important for: _____

- Pick the right **TASK**.

- Pick the right **PERSON**.

- Try the **NIKE®** approach.

Conclusion

To manage their teams' performance, supervisors and managers also need to manage priorities and time. In this lesson, you learned how establishing your priorities first allows you to focus your work on the tasks that will have the biggest impact. This prioritization will help you know when to say "no" (professionally) and what to delegate to your staff. Once you've started managing the big stuff, you can trim time and focus your attention better by using communication tools more efficiently.

Building and Maintaining a Highly Motivated, High-Performance Team

> "Life is too short to work with people whose values you do not share."
>
> — Jock Gearhart, business leader

Imagine how easy your life would be if you had a highly motivated, high-performance team…No worries about absenteeism or high turnover, no difficult talks about discipline or poor performance, no toxic workplace issues. Is it an impossible dream? Well, maybe. Even the best managers and supervisors face challenges within their teams and within their organizations on occasion. But how much better would your life be if you could lead a self-driven, target-hitting squad?

Highly motivated, high-performance teams don't appear by magic. It takes constant support and monitoring from the manager to ensure that everything is clicking. In this session, you'll explore performance management strategies for all employees: new hires, remote workers, low performers, those undergoing change, those facing burnout and more.

Learning objectives

By the end of this session, you'll be better able to:

- Give feedback and boost the morale of your team — whether on-site or remote.
- Turn around difficult employees and eliminate problem behaviors.
- Help new employees hit the ground running.
- Inspire your people during change or transition.

Constructive Feedback

Now that we understand what motivation actually is, let's find out what generally motivates a team member in the twenty-first century. You might be surprised.

WORK GROUP CHARACTERISTIC	YOU	M	E
Tactful discipline			
Good working conditions			
Personal loyalty			
Promotion and growth			
Interesting work			
Good wages			
Job security			
Help on personal problems			
Feeling in on things			
Full appreciation of work done			

The LB-NT Technique

- Like Best …
- Next Time …

The Burger Technique

- Specific behavior
- Manager's feelings/emotion
- Verifiable fact

The Sandwich Technique

- Positive
- Negative
- Positive

The "Thank You" Technique

The Management Cool CAT

To gain enthusiasm and buy-in for accomplishing goals, a leader needs to gain commitment from all team members, take specific actions to cultivate motivation and effectively track the team's progress.

Ⓒ Commitment

- Community
- Meaning
- Growth
- Contribution
- Influence

Ⓐ Actions

It is said that an effective team leader plays many roles: Director, educator, coach, motivator, counselor, facilitator and delegator. When it comes to motivation, a leader must direct the team toward success. This is done by creating a motivating environment, properly generating and tracking goals, and understanding the stages of team development.

The four stages of team development:

1. Forming
2. Storming
3. Norming
4. Performing

⊤ Tracking

EXERCISE

Write down a goal you have for your team to accomplish in the next quarter.

Your team is more likely to achieve its goals if they are TARGETed for success!

T

A

R

G

E

T

Now revisit and evaluate the goal you wrote down. Does it hold up to the TARGET criteria?

Proven Morale Boosters for Employees Nearing Burnout

Causes:

Manifestations:

Solutions:

1. Be supportive of the team member.

2. Consider changing their job responsibilities.

3. Create a more balanced work environment.

4. Allow humor and fun in the workplace.

5. Give the team member more control and latitude.

6. Help the team member learn something new.

7. When all else fails, suggest professional counseling.

How to Help New Employees Hit the Ground Running and Succeed on the Job

1. Remember that an employee's first day might be the most important one. Greet the employee. Make sure the new hire feels welcomed, important and at home.

2. Make sure that job requirements and expectations, including outcomes and consequences, are clearly outlined on the first day. Give timelines and deadlines if appropriate. This should be presented verbally and in writing.

3. Be enthusiastic with the new hire; spend some quality time with them. Maybe take the new hire to lunch.

4. Give copies of all pertinent items (e.g. handbooks, policy manuals, job descriptions, etc.) on the first day.

5. Arrange for all training needed to fill in the gaps in any knowledge or skill to ensure the new hire's success.

6. Conduct an informal walk-through of the physical work environment, introducing them to other employees, especially all the right people.

7. Consider creating a mentoring program that pairs new hires with reliable, more experienced team members.

8. Explain your open-door policy to all.

9. Follow up at reasonable intervals.

Tips for Supervising Remote Employees
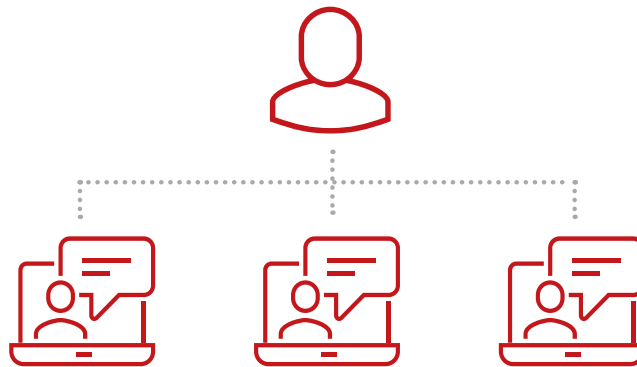
☑ Be crystal clear on all job expectations, the job description, deadlines, rewards and consequences.

☑ Keep a photo of the employee near your computer or phone, so they don't become faceless.

☑ Have other key employees communicate with the remote employee whenever possible.

☑ Use email, teleconferencing, videoconferencing, etc., to include the remote staff member in team meetings.

☑ Schedule regular virtual meetings. Keep these appointments just as you would all others.

☑ Remember, with email you lose all visual and vocal components of communication; choose words carefully.

☑ Evaluate the employee's performance (informally) at more frequent intervals than on-site employees.

Turning Around Difficult Employees and Eliminating Problem Behaviors

How to facilitate a professional, productive employee confrontation

1. Maintain privacy.

2. Avoid referring to third parties.

3. Minimize interruptions.

4. Avoid distractions.

5. Use a script whenever possible.

6. Control your emotions in advance.

7. Establish the facts.

8. Assess the probable impact.

9. Seek behavior-related change.

10. Determine minimum performance standards.

WHEN FIRING SEEMS IMMINENT — KEY LEGAL CONSIDERATIONS

1. Provide feedback early and often so that the employee knows they are failing.

2. Craft a fair and comprehensive Performance Improvement Plan (PIP).

3. Carefully follow your organizational guidelines for discipline and termination.

4. Make sure you have the full support of your upper management and HR.

5. Document, document, document. Stick to the facts; no opinion or interpretations.

6. Give the employee adequate time to correct the situation.

7. Make sure the employee is aware of the procedure for contesting the disciplinary actions being taken, up to and including termination.

8. Don't wait too long. The longer you wait to begin disciplinary action, the more difficult it becomes to fairly, ethically and sometimes legally terminate a "problem" employee.

The Leader's Role in Making Change Happen

- Change is uncomfortable
- Change is unpredictable
- Change may seem unsafe
- Previous bad experience
- Personal predisposition
- Lack of trust with management

WHY INDIVIDUALS RESIST CHANGE
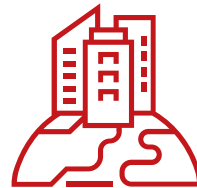
WHY ORGANIZATIONAL CHANGE FAILS

- Lack of employee involvement
- Management's fear of change
- Inability to lead the change
- Too much change too fast
- Ignoring importance of WIIFM
- Lack of trust with staff

Inspiring your team during change or transition and dealing with resistance

1 Give the team a reason to do something different. This may be an urgent reason such as loss of market share, lower profits, etc. This will create a sense of urgency about the change.

2 Find the unofficial power brokers in the organization or on your team. There are people who have a natural power or presence about them. This presence draws people to them, so they are able to exert tremendous influence over the rest of the team. Spend some extra time with these people, making sure they know what the changes are and why they are needed.

3 Help team members see the possibilities. What could be? Most people will respond to an articulate vision or a challenge if they see the possibilities of what could be.

4 Empower your team. Provide as much information, responsibility and authority as you can. Let employees continue to function as a team during the change or transition.

5 Thank or reward incrementally. Do not wait until 100% of your team has embraced 100 percent of the change 100% of the time. When you see team members even making an effort to embrace the change, notice it. Thank or reward them in commensurate ways.

6 Keys to overcoming employee resistance to change:
- Challenge organizational beliefs, assumptions and behaviors.
- Create a willingness for people to change by modeling the behavior in yourself.
- Be alert to resistance to change and consciously work to overcome it.
- Motivate people to change (give them a reason to act) and be excited about changing.

7 If people flatly refuse to embrace critical changes, help them see the following realities:
- Change happens.
- They can anticipate, monitor and adapt to change quickly.
- They can enjoy the change.
- Document your efforts and their resistance.
- Some people will only change if there is a real consequence if they don't. Think progressive discipline.

8 Consider the following before introducing any changes:
- Fear
- Employees who feel powerless
- Inertia
- WIIFM

Conclusion

Supervisors and managers play a vital role in creating and supporting a highly motivated, high-performance team. Performance management begins before new hires even start — when the supervisor sets up an onboarding plan and establishes expectations. To get the most out of their workers, managers need to employ all their performance management tools: giving constructive feedback, fostering teamwork, managing change, monitoring for burnout and turning around poor performance.

Action Planning Worksheet

It's critical to have a plan for how you'll put into practice what you've learned during this training. When you develop specific steps for professional development, you're committing to your own success.

Make a Statement to Make a Change

Set yourself up for success by expressing how you'll use the skills and tools in this training to move in the right direction. Use the area below to set an intention and state your desired result.

If I...

(the action you plan to take)

Then...

(the desired impact of your action)

Planning to Make a Change

According to psychology professor Icek Ajezen and his Theory of Planned Behavior, there are three components to making a change: attitude, social support and perceived effort. Get ahead by setting the stage for your intention to become reality. Use the area below to plan for change.

Attitude	**Social support**	**Perceived effort**
When I am successful, I will (feel/think/act) …	I will share my intention with…	List any potential obstacles and ways you plan to overcome them:
	(make a list of people who will help you be accountable)	

Reinforcing Accountability

Consider the more manageable steps for your intention and what you might be able to accomplish in the next 30 days. Use this chart to set a plan and discuss it with your social support (colleague, mentor or supervisor).

Manageable step	Anticipated completion in the next 30 days					
	0%	20%	40%	60%	80%	100%
1.						
2.						
3.						

Continuing on the Path to Success

Now that it has been 30 days, you might have accomplished far more than you anticipated and want to go farther or, like most people, you might have fallen behind schedule. That's okay. The important thing is not giving up on your intention. Continue to make plans and strive to reach your goals. Use the area below to design a new plan for the next 30 days.

If I…

Then…

Step 1:

Step 2:

Step 3:

Appendix A: The SELF Profile

For statements 1 – 24, use the following key:

1 = Not at all like me; **2** = Somewhat like me; **3** = Occasionally like me; **4** = Usually like me; **5** = Very much like me

For questions 25 – 30, follow the stated instructions.

ODD   **EVEN**

1. When in a group, I tend to speak and act as the representative of that group.

2. I am seldom quiet when I am with other people.

3. When faced with a leadership position, I tend to actively accept that role rather than diffuse it among others.

4. I would rather meet new people than read a good book.

5. Sometimes I ask more from my friends or family than they can accomplish.

6. I enjoy going out frequently.

7. It's important to me that people follow the advice that I give them.

8. I like to entertain guests.

9. When I am in charge of a situation, I am comfortable assigning others to specific tasks.

10. I often go out of my way to meet new people.

11. In social settings, I find myself asking more questions of others than they ask of me.

12. I truly enjoy mixing in a crowd.

13. Other people usually think of me as being energetic.

14. I make friends very easily.

15. I am a verbal person.

16. I try to be supportive of my friends, no matter what they do.

17. When I see that things aren't going smoothly in a group, I usually take the lead and try to bring some structure to the situation.

18. I seldom find it hard to really enjoy myself at a lively party.

19. When in a leadership position, I like to clearly define my role and let followers know what is expected.
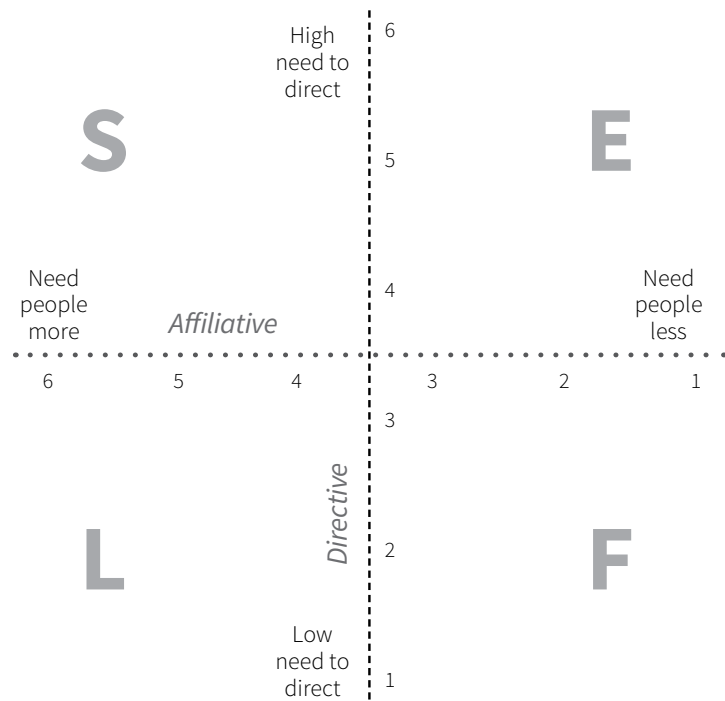
20. I consider myself to be good at small talk.

☐	21. I am very good at persuading others to see things my way.
	22. I can usually let myself go and have fun with friends. ☐
☐	23. I often find myself playing the role of leader and taking charge of the situation.
	24. I do not prefer the simple, quiet life. ☐
☐	25. You are in a conversation with more than one person. Someone makes a statement that you know is incorrect, but you are sure the others didn't catch it. Do you let the others know? If yes: 5. If no: 1.
	26. After a hard day's work, I prefer to get together with a few friends and do something active (5) or relax at home and either watch TV or read (1). ☐
☐	27. When planning a social outing with a small group, I am most likely to be the first to suggest some plans and try to get the others to make a decision quickly (5) or make sure everyone has a say in the planning and go along with what the group decides (1).
	28. You have just finished a three-month project for which you have sacrificed a great deal of your free time and energy. To celebrate, you are more likely to invite some of your friends over and throw a party (5) or spend a quiet, peaceful weekend doing whatever you wish, either by yourself or with a special friend (1). ☐
☐	29. If I feel that I am underpaid for my work, I'm most likely to confront the boss and demand a raise (5) or do nothing and hope the situation improves (1).
	30. I think that those around me see me as primarily gregarious and outgoing (5) or introspective and thoughtful (1). ☐

☐ Directive Score   **TOTALS**   Affiliative Score ☐

Once you've added up the individual columns you have a Directive Score and an Affiliative Score, both somewhere between 15 and 75. Now, turn those large numbers into single-digit numbers, so that you have a single-digit Directive Score and a single-digit Affiliative Score, by using the following key:

15 – 21 = 1   22 – 33 = 2   34 – 44 = 3   45 – 56 = 4   57 – 68 = 5   69 – 75 = 6

Place a dot on the corresponding point on each of the lines in the grid below. Place a dot on the vertical, or Directive, axis for your Directive score, and place a second dot on the horizontal, or Affiliative, axis for your Affiliative score. Once you have one dot on each axis, draw a straight line connecting the two dots. You have now formed a triangle, which falls in one of the four quadrants.

S	High need to direct 6	**E**
	5	
Need people more	Affiliative 4	Need people less
6　　5　　4	3　　2　　1	
	3	
L	Directive 2	**F**
	Low need to direct 1	

Guidelines for using this information

1. The information in this test is designed to aid you in self-awareness and understanding others in broad and general terms. However, there will be exceptions to these general categories. Human beings are complex creatures whose behavior is greatly affected by a variety of factors. Therefore, they are not always so easily categorized.

2. Remember that an individual's behavior is greatly affected by the situation they're in. So, you can expect individuals to exhibit a variety of different characteristics in different situations. Therefore, look for consistent information across several settings before categorizing others into any one dimension. We are all a mix of all other dimensions.

3. No personality style is better than any other. There are successful managers from all four different dimensions. Our success as a manager, peer or subordinate in a work environment can be greatly enhanced if we have a better understanding of the motivations, strengths, limitations, turn-ons and turnoffs of those people we interact with every day. The SELF Profile is a highly effective tool for gathering such information.

4. It will help you to remember that an individual's social style is the product of many years of development and is not easily changed. You will be wise to accept others as they are — for both their strengths and limitations — rather than attempting to change them.

Strengths

- Persuasive
- Risk-taker
- Competitive
- Pursues change
- Confident
- Socially skilled
- Inspiring
- Open
- Direct
- Outgoing

- Practical
- Orderly
- Very direct
- Self-determined
- Organized
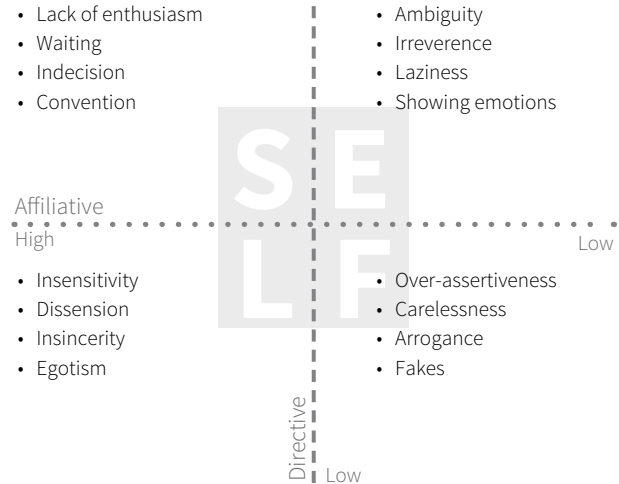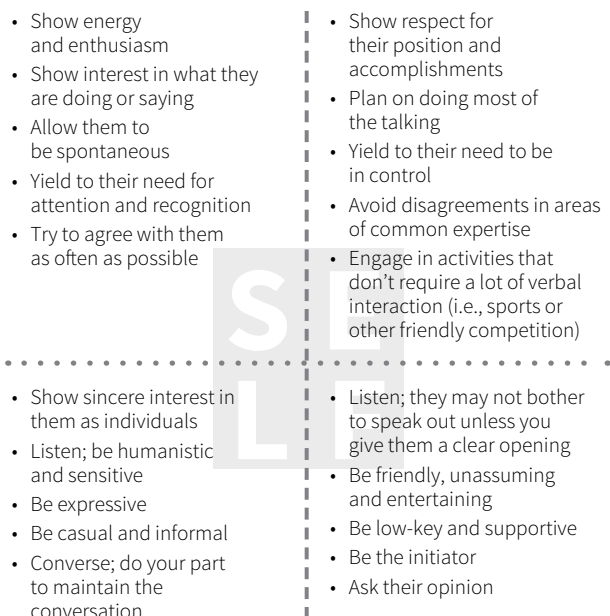- Traditional
- Goal-oriented
- Dependable
- Economical
- Ambitious

Affiliative
High ... Low

- Team-oriented
- Caring
- Devoted
- Enthusiastic
- Helpful
- Accessible
- Trusting
- Sensitive
- Good listener
- Good friend
- Likes variety
- Gregarious
- Peacemaker

- Exacting
- Thorough
- Factual
- Reserved
- Meticulous
- Practical
- Calm
- Has high standards
- Risk-avoider

Directive
Low

Limitations

High

- Pushy
- Intimidating
- Overbearing
- Restless
- Impatient
- Manipulative
- Abrasive
- Reactive
- Dominating

- Dogmatic
- Stubborn
- Rigid
- Unapproachable
- Distant
- Critical
- Insensitive

Affiliative
High ... Low

- Too other-oriented
- Indecisive
- Impractical
- Vulnerable
- Hesitant
- Subjective

- Slow to get things done
- Perfectionistic
- Withdrawn
- Dull
- Sullen
- Shy
- Passive

Directive
Low

Turn-ons

High

- Attention
- Achievement
- Recognition
- Adventure
- Excitement
- Spontaneity

- Control
- Responsibility
- Mastery
- Loyalty
- Fast pace

Affiliative
High ... Low

- Popularity
- Closeness
- Affirmation
- Kindness
- Caring

- Perfection
- Autonomy
- Consistency
- Practical
- Information

Directive
Low

Turnoffs

High

- Lack of enthusiasm
- Waiting
- Indecision
- Convention

- Ambiguity
- Irreverence
- Laziness
- Showing emotions

Affiliative
High ... Low

- Insensitivity
- Dissension
- Insincerity
- Egotism

- Over-assertiveness
- Carelessness
- Arrogance
- Fakes

Directive
Low

Positive actions you could take

- Show energy and enthusiasm
- Show interest in what they are doing or saying
- Allow them to be spontaneous
- Yield to their need for attention and recognition
- Try to agree with them as often as possible

- Show respect for their position and accomplishments
- Plan on doing most of the talking
- Yield to their need to be in control
- Avoid disagreements in areas of common expertise
- Engage in activities that don't require a lot of verbal interaction (i.e., sports or other friendly competition)

- Show sincere interest in them as individuals
- Listen; be humanistic and sensitive
- Be expressive
- Be casual and informal
- Converse; do your part to maintain the conversation

- Listen; they may not bother to speak out unless you give them a clear opening
- Be friendly, unassuming and entertaining
- Be low-key and supportive
- Be the initiator
- Ask their opinion

Actions to avoid

- Boring them
- Being indifferent
- Letting them bowl you over with energy
- Forgetting their birthday or other special occasion

- Expecting a lot of warm emotions
- Expecting praise or thanks
- Expounding on your differences
- Being offended by their distance

- Taking advantage of their willingness to help
- Being distant and unapproachable
- Being unappreciative or forgetting their efforts
- Forgetting to return their favors

- Being arrogant or boastful
- Being loud or pushy
- Speaking "knowingly" on that which you know little
- Taking over (they may let you but they'll resent it)

Appendix B: The New Manager's Tool Kit

Success Habits for Establishing Your Credibility as a Leader — Fast

1. Lifelong learning

2. Adaptive to change

3. Solves problems, not symptoms

4. Actively celebrates others' success

5. Speaks up when needs are not being met

6. Influences how others think and act

7. Brings conflicts to the surface and works to resolve them quickly

8. Delegates and collaborates rather than doing everything themselves

9. Uses a blended style of management

10. Consciously builds trust and respect

10 Proven Tips for Recruiting Top-Notch Employees

1. Determine the needs of your organization and the attributes needed to fit into your organization.

2. Identify exactly what you can offer a new hire.

3. Encourage your current employees to refer colleagues, friends and family members.

4. Create a recruiting plan with all of the above in mind.

5. Advertise in the usual places, but increase your reach with online job boards and professional platforms like LinkedIn.

6. Develop relationships with local university and college counselors.

7. Network at local chambers of commerce; speak at Kiwanis, Rotary, Toastmasters, etc.

8. Tell hiring managers and HR associates as much as you can about the kind of employee you need.

9. Check references — especially personal references, who will usually talk more freely than business references.

10. Talk to personal friends and family members — they may know the perfect fit for your group.

21 Keys to Effective Interviewing

1. Know the job description inside out; be sure it is updated and comprehensive.

2. Carefully review the application and resume before meeting the applicant.

3. Don't ask any personal, unnecessary questions; concentrate on BFOQs.

4. Be prepared; never improvise or play it by ear.

5. Prepare the interview area; avoid using "personal space" for the interview.

6. Put the candidate at ease — but not too much.

7. Outline the interview. Explain the process to the interviewee.

8. Keep an open mind; don't make a decision too soon.

9. Let the candidate do most of the talking (90/10).

10. Don't use too many closed-ended questions.

11. Use open-ended, scenario-based questions.

12. Don't lose focus; be attentive.

13. Observe body language.

14. Take notes — but not too many; never write on the application or resume.

15. Nail 'em down! Don't let the candidate get away with speaking only in generalities.

16. Maintain control.

17. Probe incomplete answers, but be careful.

18. Keep your reactions to yourself.

19. Don't oversell the organization to the candidate. Be honest.

20. Let the candidate know when to expect a call, letter or decision.

21. End the interview session on a positive, upbeat note.

Strategies for Successful Performance Evaluations

1. Set clear performance standards. Employees should know what is expected of them and have a good idea of how well they are doing in adhering to those standards. Don't wait for the formal performance appraisal. Communicate regularly with your employees about their performance. The official performance review should not be a surprise since you have been communicating clearly and carefully throughout the review period.

2. Ask the team members to perform a self-evaluation. Give each person the same form you will be using, and have each team member complete it before your meeting. The difference between what the employee sees and what you see becomes the heart and soul of your discussion.

3. Follow the 50/50 Rule: Spend at least 50% of the conversation discussing goals for the future and 50% on specific guidelines for improvement. End on a positive note.

4. Be objective and fair with each team member.

5. Have them review you.

Appendix C: Email Tips

1. When you hit the "send" button, assume everyone in the company, including and especially your boss, will see it.

2. Group similar messages into folders.

3. Reduce unwanted email with a junk mail filter.

4. When replying to an email, use some sort of salutation to appear professional and avoid coming across as impatient or impolite.

5. Be concise.

6. Ensure the subject line accurately reflects the content and nature of your message. Avoid general subject lines like "Important Information."

7. Make sure the first sentence contains the gist of your message.

8. Use bullet points whenever possible. Don't bury items within the prose of a sentence.

9. Ask the original sender's permission before forwarding a message.

10. Respond to emails in a timely manner, even if it's only to give the writer a heads-up as to when a more comprehensive response should be expected.

11. Send only business and work-related emails at the office. Use a completely separate account and screen name for personal use.

12. Remember, your company emails are probably company property.

13. When it comes to email, remember the Golden Rule: Do unto others …

14. Keep ease and convenience in mind with all of your emails.

15. Make sure all your emails look professional.

16. Pay attention to spelling and grammar.

17. Try to organize things so you only handle emails once.

18. Make sure the recipient's address is the last thing you fill in. This will avoid sending it prematurely.

19. Whenever possible, limit your entire message to one screen.

Appendix D: My Success Checklist

☐ Take steps to move toward the leadership side of management.

☐ Begin to network with more experienced leaders and managers.

☐ Devote a specific amount of time per week to reading or listening to new material.

☐ Turn my car into a classroom; commit to lifelong learning.

☐ Attend more seminars, Webinars and training events.

☐ Develop friendships with other managers outside my industry.

☐ Find a mentor or a mentoring influence.

☐ Get some good reference material.

☐ Formulate my personal improvement plan and keep it up to date.

☐ Work on communication skills.

☐ Start explaining why just a little more than I do now.

☐ Make the choice to be a leader.

☐ Promise less, deliver more.

☐ Clarify or reclarify my expectations with friends and former co-workers.

☐ Rethink the amount of "personal" time I spend with the rest of the team.

☐ Guard myself against unintentional gossip.

☐ Clarify or reclarify my expectations of the team.

☐ Take training of team members more seriously.

☐ Start a "manager's diary" and obtain a good reference for creating "official" documentation.

☐ Involve the team in decision making whenever possible — think ownership.

☐ Learn to be a good delegator.

☐ Prioritize "problems" within my plan.

☐ Support my employees wholeheartedly.

☐ Get clarification from my boss, regarding their expectations of me.

☐ MBWA: Manage by walking around.

☐ Bring as many good, talented people to my team as I can.

☐ Build on my strengths; shore up weaknesses.

☐ Learn about people as individuals.

☐ Study the SELF Profile. Use the information to be a better leader; and share it with the team.

☐ Consciously make deposits into the emotional bank accounts of all my associates.

☐ Have some fun!

☐ Create a resource library for myself and my team members.

☐ Use the five steps for giving crystal-clear directions.

☐ Follow the 10 pointers for more effective meetings.

☐ Join Toastmasters International.

☐ Eliminate objectionable words from my managerial vocabulary.

☐ Improve my writing skills—reference tools, seminars, community college classes, etc.

☐ Obtain a good reference for writing.

☐ Create more efficient, professional emails.

☐ Develop active listening skills to hear what's really being said.

☐ Eliminate any personal filters or biases I may have developed.

☐ Use the reflective listening technique whenever appropriate.

☐ Listen with my ears, mind, eyes and heart…with undivided attention.

☐ Pay closer attention to how I prioritize my time.

☐ Start to use the criteria of the prioritizing system when prioritizing daily events.

☐ Incorporate some of the time-saving tips with my email, voice mail and faxes.

☐ Learn to say "no" to some good things, to make more time for the "great" things.

☐ Look into some time-management software to aid in my personal time management.

☐ Experiment with delegation; create a specific delegation plan.

☐ Use the Nike® approach.

☐ Learn what motivates my team members.

☐ Use some of the constructive criticism techniques.

☐ Concentrate on the five ingredients for commitment.

☐ Take steps to make sure my team members know every day that everything they do matters.

☐ Work to eliminate some demotivators in my work group.

☐ Make sure all our goals are TARGETed goals.

☐ Guide my team through the process of developing a compelling scoreboard.

☐ Be on the lookout for employees nearing burnout.

☐ Experiment with new ways to recruit employees.

☐ Plan a specific, great first day for new hires or transfers to my team.

☐ Create a mentoring program for new hires.

☐ Learn to be a good interviewer. Attend classes and seminars, and read books.

☐ Incorporate some of the dos and don'ts into my interview process.

☐ Create a real plan for supervising my remote employees.

☐ Use a planning tool and a specific script when dealing with "problem" employees.

☐ Learn more about change management; know that it's uncomfortable for most people.

☐ Involve my team in facilitating change as much as I can.

☐ Make change incremental whenever I can.

☐ Communicate the WIIFM of changes whenever possible.

☐ Acknowledge and reward the team incrementally as they implement change.

☐ Make my manager aware of my career aspirations.

☐ Toot my own horn whenever opportunities arise.

☐ Publicize my team members' accomplishments.

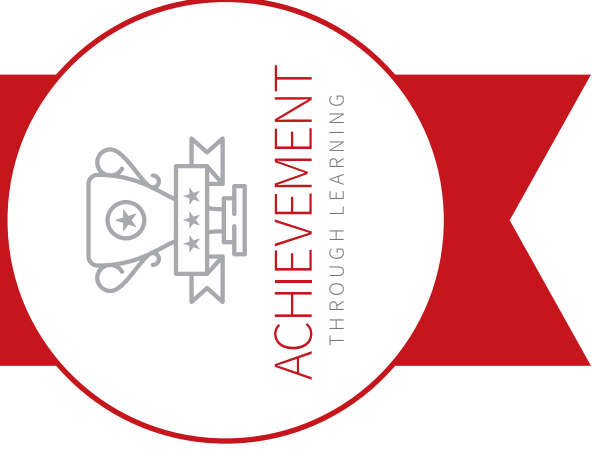☐ Create and use a reasonable progress report system with my boss.

Notes

Notes

CERTIFICATE

OF COMPLETION

This is to certify that the following participant has successfully completed:

Management and Leadership Skills for First-Time Supervisors and Managers

ACHIEVEMENT

THROUGH LEARNING

Course Date and Location

Michele Markey

Michele Markey, SkillPath CEO

Participant Name

Attending a SkillPath course may qualify for Continuing Education Credits based on program length and completion in accordance with the National Task Force for Continuing Education guidelines. Save this Certificate of Completion and your course outline — and contact your professional licensing board or organization to verify specific requirements.

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