

# New Managers – Handling Common Dilemmas Checklist 199



## Introduction

This checklist offers advice for first-time managers who have been promoted into a managerial role within their organisation. A promotional opportunity may have arisen as a result of organisational restructuring, or where an existing member of staff has moved on. It may have been something to which one has been aspiring for some time. Alternatively, it may have come as an unanticipated, or even an unwelcome surprise. Whatever the circumstances, a promotion suggests that a person's skills, knowledge and ability to take on a more challenging post have been recognised by senior management.

Taking up your first management role can be both an exhilarating and a demanding time. An elevation in position brings with it increased authority and control, as well as greater accountability, both for your own performance as well as that of others. As a result, the relationships you previously had with colleagues and peers may very well change, with a shift in both their perception of you, and your view of them. In order to assist managers who have been promoted to a higher grade, a selection of common situations that newly promoted managers may encounter are presented, and advice on how to deal with each effectively is offered. In addition, the following are worth bearing in mind:

- you can learn from watching and listening to your team
- you will need to reach agreement with your new manager on your responsibilities and goals
- you will need to work at developing relationships with your new manager and peers
- it is vital to seek help and advice where necessary, from either your manager or HR Department
- work-based activities and meetings can be used as an opportunity to 'bond' with your team
- you should be prepared to develop new skills
- you need to take stock regularly, learning from what went well and what did not.

## Definition

A new manager is somebody who has taken on their first management or supervisory position.

## Action Checklist

This checklist gives examples of six kinds of situations commonly faced by new managers and provides guidance on how to handle them. The skills developed in these situations should set you up for success in the long-term.

**Scenario 1** - After the initial celebrations, you realise that your team seem to be shutting you out: conversations dry up when you enter the room; they may socialise without you and somehow you no longer seem to hear any gossip. There may even be snide comments.

**Response:** This is common. Accept that things have changed: where before you were a peer, you are now the manager. However, this does not mean that you cannot have friendly relationships with the people in your team - but those relationships should be different. You have new responsibilities which will be difficult to fulfil if you do not distance yourself a little from your team. These include: maintaining performance levels and managing poor performance, carrying out performance appraisal discussions, handling disciplinary or grievance issues and maintaining confidentiality about sensitive issues such as prospective restructuring. As a manager, you are also a representative of your department, and you may have to either defend unpopular senior management decisions to your team; or to speak up for your department when dealing with other members of the management team in your organisation.

This does not mean that you should go to the other extreme and exert your status and authority unnecessarily or inappropriately. You should seek the middle ground. Whilst you are likely to be less outspoken as a manager, this does not mean that you cannot state your opinion or share your views, as long as this is done at the right time and in an appropriate manner.

Any initial extreme or emotional reactions are likely to naturally die away after a period, provided you maintain a friendly attitude. Put a smile on your face, chat casually when it is appropriate to do so, bring in some cakes or biscuits or suggest a social outing if somebody has something to celebrate. You could, for example, get a list of your team members' birthdays from HR.

Consolidate your new relationship with the team by bringing them together for work-based activities. Short, regular team meetings (half an hour to an hour a week, or maybe a daily 10 minutes first thing in the morning) will enable you to:

- keep track of what each person is doing and get advance warning of potential bottlenecks or crises
- share any company or departmental information you have
- get ideas to improve working practices
- deliver short, focussed training on new processes and systems.

Develop relationships with your new manager and peers. You probably feel like the new kid on the block, but most people will remember how they felt in your position and will make you welcome. Again, smile, be prepared to make the first move, but don't be too pushy. Don't hesitate to ask for help or advice as almost everyone will feel well disposed towards people who recognise their knowledge and experience.

**Scenario 2** - Everything seemed to be going well, but now, for no real reason, your team's performance seems to have gone downhill – you have no idea what you have done wrong, but you are sure you will get the blame.

**Response:** Don't panic! This can be a very common, and hopefully short-lived, response to a change in team dynamics. Typically, people faced with change (and a new manager can be a major change) respond in a similar way. Initially there may be disbelief or even denial if the change is unpleasant; then comes a period of fairly high energy and activity when work performance may be high; this is commonly followed by a period of confusion, apathy or depression leading to lack of energy and poorer work performance, which seem to be a necessary precursor for full acceptance of the changed situation and future success (see Figure 1).

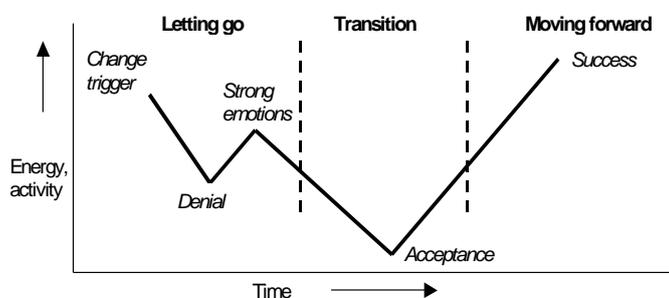


Figure 1: Kubler-Ross Change Transition Curve

Day-to-day progress through this pattern is rarely smooth and people often see-saw backwards and forwards.

To help your team through the change process:

- accept that they may regret losing their previous manager ('At least we knew where we were with X, you could rely on him to...'). They may also feel insecure their own positions, especially if your promotion was part of a wider restructuring. Accept a certain amount of moaning and negativity, which is natural
- show your confidence in your people and the organisation by publicly acknowledging successes. Any negative feedback should be handled in a private one-to-one session.
- involve them in setting departmental goals
- avoid introducing more changes, if you can, until the current change has been worked through
- be consistent in your approach when dealing with team members
- inform the team of any future changes, to help them to prepare for these.

Even though your promotion may be welcome, don't be surprised if your own emotions and reactions follow the same roller-coaster pattern.

**Scenario 3** - Now you have been promoted, there are a number of things in the department which you would like to change – systems and procedures, for example, or even the office layout.

**Response:** Be careful. Remember the change transition model (Figure 1) and tread softly at first. Be especially sensitive to changes in office or workplace layout. People can become attached to their particular corner of the room or desk. One of the best ways of helping a new team to work productively together is to locate them in the same working area. This is something you may want to think about if your team is currently scattered in different locations.

If possible, try to base yourself with your team. Depending on the organisational culture and the design of your building, you may be situated in a separate office. If so, spend as much time with them as you can. If you and your team are located in an open-plan area, try to ensure that there is a private room nearby for one-to-one meetings. If you are working at different sites or you are managing a virtual team, try to arrange face-to-face meetings on a regular basis, if possible, and keep in regular online and telephone contact to maintain good working relationships.

Involve team members in any changes that you would like to propose. They will have their own views and their experience at the "coal-face" is often extremely valuable in determining whether the change is necessary and/or realistic. If appropriate, be prepared to reshape or even abandon your ideas after consulting with your team. This will not be perceived as weakness; rather as you demonstrating confidence in them.

**Scenario 4** - You don't know how to fill your day. In the past, you knew what your job was and you got on and did it – well. Now, there don't seem to be many fixed tasks that you need to carry out, but you have an uncomfortable feeling that you are missing something, and that it will rebound on you later.

**OR**

Somehow, you seem to have become everybody's dogsbody. Your management job seems to consist of paperwork chores that anybody could complete, and dealing with all the stuff that nobody else wants to handle. Consequently, you are run off your feet but never really seem to accomplish anything.

**Response:** These situations are more likely to arise where the position to which you have been promoted is a new one rather than if you are replacing a previous manager. Although the two scenarios may seem very different, they can be handled in the same way.

Establish what your manager is expecting from you and agree a job description (write your own draft if one does not already exist). As a manager you are likely to be measured according to your achievements in the following areas:

- delivery of product or service targets
- cost control

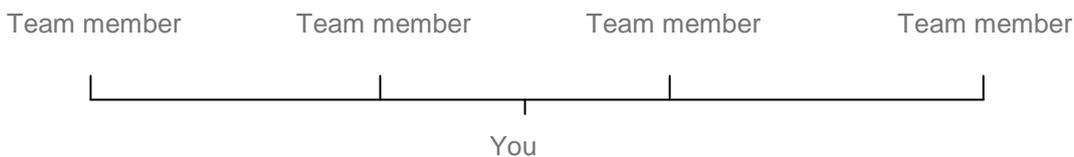
- customer satisfaction
- people management
- process/system/equipment maintenance
- future planning.

Aim to have one or two goals or performance standards in each of these areas. Be clear about your responsibilities and the business objectives of the team. The ability to manage your relationship with your own manager is one of the most important management skills. (See our checklist on managing your relationship with your boss under Related Checklists below.)

Try to agree priorities with your manager, and sort out how and with what frequency your manager would like you to report back on your own activities, and those of your team. In the early days, even if it is not a requirement it can be useful for you to prepare a brief weekly report summarising that week's achievements and activities. Try also to set up regular meetings with your manager. These have obvious communication benefits and will help you both to develop your relationship.

You may want to set up similar regular meetings with your key direct reports. This will help you keep track of what is happening without constantly breathing down their necks, and may enable you to delegate some of those chores. Be careful that you delegate the appropriate authority as well as the tasks or you may be perceived as just dumping the drudgery and retaining the rewards.

In many ways, as it is your team who achieve the results, your main function is to enable them to do so. This can be visualised by turning the organisation chart upside-down.



**Scenario 5** - Your friend John has never been the best of workers. He has always believed in doing the least he can get away with and still get paid, and you have often covered for him in the past. Now you are his manager and responsible for the results.

**Response:** This can be an awkward and difficult situation. You may feel sad that your friendship with John may be affected; you might feel very angry and almost betrayed that John, your friend, is letting you down like this; you may feel anxious that his performance will reflect on you; you may even feel apprehensive that you will, at some stage, have to take formal action against him. On top of this, he may be genuinely delighted at your promotion and even expect you to go on covering for him.

You need to talk calmly, honestly and informally with John as soon as possible. The longer you leave it, the worse the situation will become. Explain your position to him and acknowledge that you would very much like your friendship to continue. Allow John to respond to your concern. He may well have issues he wants to raise. However, don't deceive yourself. The change in your position is likely to have an impact on your relationship.

If poor performance continues, do not ignore it. Try the informal approach first, probably more than once, but be prepared to take action if you need to. Be careful to treat John neither more leniently nor more strictly because he is a friend. It will be helpful in supporting any future actions if you maintain a record of any meetings.

Seek the advice of your HR representative or another manager, to ensure that your perspective is not being distorted by your friendship. You will be expected to follow any internal policies and procedures covering the process of dealing with poor performance, and it is important to get it right from the beginning.

**Scenario 6** - When you first joined the department, Susan was your mentor. She had the most experience and everybody looked up to her. Susan showed you, and all the other new employees, the ropes. Admittedly, after some time you realised there were some parts of the job (mainly to do with new processes

and technology) that Susan had ignored or been scornful about. You suspect that this is why you, despite your comparative inexperience, have been promoted, rather than Susan.

**Response:** Don't assume that Susan would have wanted the promotion, and is therefore jealous and angry with you. This may be the case, but she may equally be delighted that one of her protégés has been successful.

Susan's experience and expertise will be very valuable to you and the team. Tell her so, and make it clear how much you appreciated her help in the past. Involve her in areas where her strengths will be useful, for instance in continuing to mentor more junior staff. However, you may want to supplement this with support in new process and technology areas. If she is keen to develop further, give her special support (maybe formal training) in these areas. Make sure that your manager and other team members know that Susan is valued.

Delegate more challenging responsibilities to her as appropriate, and ensure that she receives the recognition and visibility for these achievements. If she is then promoted, be delighted in her success. At the same time, make sure you have somebody suitably positioned as her successor, should the need arise.

## Managers should avoid

- making promises that you may not be able to keep
- rushing into making changes
- taking up fixed positions which leave you no room to change your mind or manoeuvre
- letting the power of your new job 'go to your head'
- micro-managing your team.

## National Occupational Standards for Management and Leadership

This checklist has relevance to the following standards:

Unit BA2 Provide leadership in your area of responsibility

Unit BA3 Lead your team

Unit DD1 Develop and sustain productive working relationships with colleagues

## Additional resources

### Books

**Managing to manage: the essential guide to people management**, Derek Torrington

London: Kogan Page, 2013

This book is also available as an [e-book](#)

**Managing for people who hate managing: be a success by being yourself**, Devora Zack

San Francisco Calif: Berrett-Koehler, 2012

**The essentials of management: everything you need to succeed as a new manager**, 2<sup>nd</sup> ed., Andrew Leigh

Harlow: Pearson, 2012

**The first time manager**, 6<sup>th</sup> ed., Loren B Belker, Jim McCormick and Gary S Topchik

New York NY: AMACOM, 2012

**Suddenly in charge: managing up, managing down, succeeding all around**, Roberta Chinsky Matuson

Boston Mass: Nicholas Brealey, 2011

**The management book: how to manage your team to deliver outstanding results**, Richard Newton

Harlow: Financial Times Prentice Hall, 2011

This book is also available as an [e-book](#)

This is a selection of books available for loan to members from CMI's library. More information at: [www.managers.org.uk/library](http://www.managers.org.uk/library)

### Journal Articles

**Getting a new manager started**, Paul Matthews  
Training Journal, August 2013, pp 26-30

**Taking the lead**, Emilie Dunnigan  
CMA Management vol 82 no 6, October 2008, pp 14-15

These articles are available for members to download from CMI's library. More information at [www.managers.org.uk/library](http://www.managers.org.uk/library).

### Related checklists

Succeeding as a new manager (133)  
Managing (your relationship with) your boss (047)

### Internet resources

**Top 10 New Manager Mistakes** from about.com <http://management.about.com>  
Lists the most common mistakes new managers make so you can avoid them.

**This is one of many checklists available to all CMI members. For more information please contact**

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