

# **Succeeding with Your New Manager**

**Strategies for Getting  
Your Relationship Right**

# USER GUIDE

## **Purpose:**

Established teams often experience “growing pains” under the leadership of newly promoted managers. In fact, more than half of all newly promoted first-line managers struggle in their new roles. And as newly promoted managers struggle, so do their teams. However, teams that actively help their new managers get up to speed can make a real difference, boosting the performance of both their managers and themselves. This guide has been designed to help you more effectively guide your newly promoted manager through his or her transition without increasing the time you already dedicate to this activity.

## **Audience:**

Direct Reports of Newly Promoted, First-Line Managers

## **How to use:**

- Why is it critical for you to help your newly promoted manager transition into his or her new role?
- Which activities will be most effective in helping your newly promoted manager succeed?
- How can you simplify the transition process for your newly promoted manager (and yourself)?

# A QUICK SUMMARY OF THIS GUIDE

- 1 Your Newly Promoted Manager Faces a Big Challenge**  
More than half of all newly promoted, first-line managers struggle in their new roles.
- 2 It's in Your Best Interest to Help**  
When newly promoted managers struggle, so do their teams. If your manager struggles, your performance may suffer.
- 3 You Can Make a Difference**  
You don't need to do a lot to help your manager. By refocusing on a handful of the right activities, you can improve your new manager's performance.
- 4 Being Open to Change Helps, but You Also Need to Be a Coach**  
It's helpful if you remain open to new ideas and you adapt to change. But that's not enough. You'll have a bigger impact if you also provide your newly promoted manager with insight into your team's strengths and weaknesses, offer feedback, and provide "upward" coaching.
- 5 This Guide Is Designed to Make Things Easier for You**  
This guide contains a quick assessment and tools designed to help you improve in your efforts to get your newly promoted manager up to speed.

Source: CEB analysis

# ROADMAP FOR THE GUIDE

## The Business Case

**Why is it critical for you to help your newly promoted manager transition into his or her role?**

## Focusing Your Time on the Right Activities

Which activities will be most effective in helping your newly promoted manager succeed?

## Increasing Your Effectiveness

How can you simplify the transition process for your newly promoted manager (and yourself)?

**Just as the arrival of a newly promoted manager creates stressful questions for you, your new manager confronts equally stressful challenges.**

- The arrival of a new manager means your job will change.
- Unfortunately, how your job will change is not always immediately clear, creating apprehension as you anticipate how a new boss will affect your current and future projects, role within the team, performance, development, and career.
- These questions are common and the anxiety they create is significant.
- And just as you're asking these questions, your manager has questions, too.
- The good news, though, is that you can make things easier for yourself by making things easier for your manager.

## ANXIETY ALL AROUND

### Your Questions

- Will I get along with my new manager?
- Will my work style clash with that of my new manager?
- What new processes or procedures will my new manager put into place?
- Will my performance and development suffer with this change?
- What changes will my new manager make to the team, my role, and my projects?
- How can I build a positive relationship with my new manager?
- How can I make sure my new manager recognizes my strengths?
- How do I make sure that my new manager recognizes the contributions I made before he or she arrived?

Source: CEB analysis.

### Your New Manager's Questions

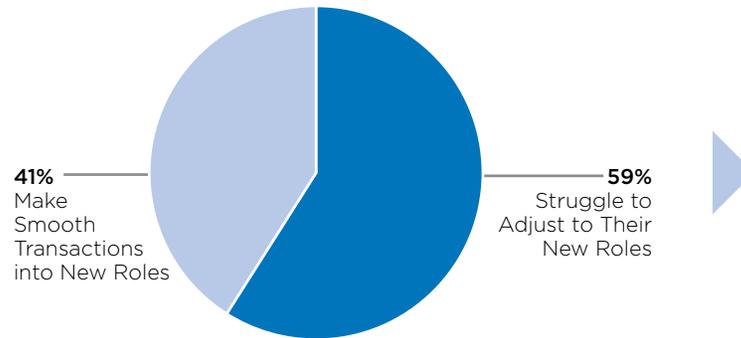
- Will I get along with my new team?
- Will my work style clash with that of my direct reports?
- What are the strengths and weaknesses of my new team?
- How can I build positive relationships with my direct reports?
- What projects should be our top priority?
- Who are the key players, and what are the unspoken rules of my new role?
- What are the political "land mines" of my new job?
- How can I establish my authority as manager without alienating my new team?
- How do I quickly prove that I deserved this promotion?

More than half of all new first-line managers struggle in their roles, which is reflected in the underperformance of their teams.

- More than half of all new managers tend to struggle when they step into their new roles.
- Most new managers struggle not because they lack the skills they need, but because they have difficulty getting up to speed on the challenges they confront.
- From your perspective, though, here's what really matters: if your newly promoted manager struggles, your performance will suffer.
- By helping your new manager understand the new role and improve his or her performance, you are actually improving your own.

## WHEN YOUR NEW MANAGER STRUGGLES, SO DO YOU

Performance of Newly Promoted First-Line Managers



Source: CEB analysis.

Performance of Newly Promoted Managers' Teams

### Pain That You'll Feel

People working for struggling, newly promoted managers often struggle themselves. **On average, they'll underperform their peers by 15%.**

Source: CEB analysis.

### Why Should You Care About Your Manager's Performance?

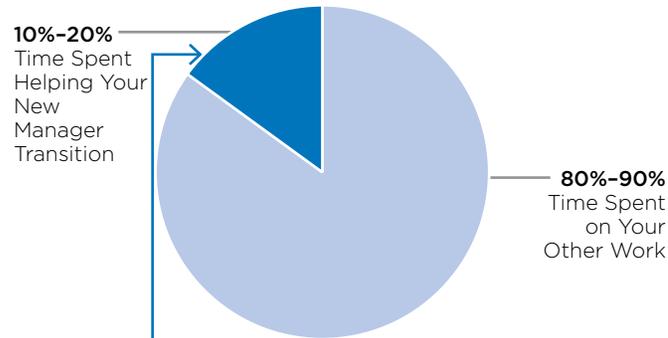
It's in your best interest to help. Your manager's struggle to lead the team has a negative impact on your performance. It also has negative ripple effects on your daily work, your role, your development, and possibly your career. By making your manager's job easier, you make your job easier. You'll improve your own performance, and you'll keep your development and career on track.

Employees already devote significant time to helping their new managers, but managers often report inadequate support from their teams.

- Although direct reports dedicate significant time to supporting their new-to-role managers, their managers report that their efforts are not particularly effective.
- This guide does not include an argument for investing more time in helping your manager; instead, it is designed to help you invest your time better.

## MAKING BETTER USE OF YOUR TIME

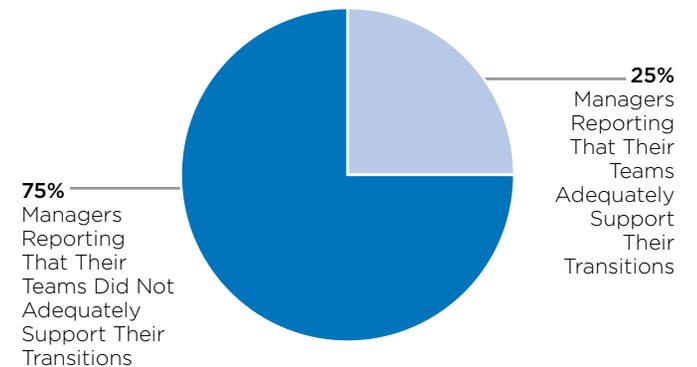
How You Spend Your Time When You Have a New-to-Role Manager



On average, employees will spend 10%-20% of their time—up to one day a week—helping their new-to-role managers get up to speed.

Source: CEB analysis.

How New-to-Role Managers Rate the Support Provided by Their Teams



More than two-thirds of managers report that they do not receive adequate support from their teams.

Source: CEB analysis.

### Not Investing More Time—Investing Your Time Better

You're already busy enough. This guide does not argue that you should spend more time helping your manager. Instead, this guide aims to help you focus on a small handful of activities that will have a real impact on your new manager's performance—impact that you will feel in your day-to-day work. By refocusing your time on the right activities, you will be able to improve your manager's performance (and your own) without investing more of your time. In the process, you'll position yourself as a trusted advisor to your new manager.

# ROADMAP FOR THE GUIDE

The Business Case

Why is it critical for you to help your newly promoted manager transition into his or her role?



**Focusing Your Time on the Right Activities**

**Which activities will be most effective in helping your newly promoted manager succeed?**



Increasing Your Effectiveness

How can you simplify the transition process for your newly promoted manager (and yourself)?

Nine activities can have a positive impact on the performance of your new-to-role manager.

- There are many activities that could potentially help smooth your new manager's transition; however, as they all appear equally important, you face the difficult task of deciding which activities deserve your time and energy.
- On this page, you'll see the nine activities that have a proven impact—activities that will make a real difference.
- The more you focus your energy on these activities, the more successful your manager (and you) will be.
- Take a moment to select the two activities you believe have the biggest impact on new manager performance.

## WHAT, EXACTLY, SHOULD I DO?

### Nine Key Activities for Helping Your New Manager

**Be Adaptable:** The extent to which you respond well to change, manage multiple priorities, and make the most of existing resources

**Be Open to Change:** The extent to which you are open to new ways of doing things

**Give Feedback on Ideas:** The extent to which you provide your new manager with constructive feedback on his or her ideas

**Help Leader Learn Responsibilities of New Job:** The extent to which you help your new manager learn the responsibilities of his or her new role

**Help Leader Learn Team's Work Goals:** The extent to which you inform your manager of your long-term work goals

**Help Leader Learn Team's Work Methods:** The extent to which you explain to your manager how you get your work done

**Share Team's Strengths and Weaknesses:** The extent to which you provide your new manager with a sense of your own strengths and weaknesses

**Share Top Challenges:** The extent to which you provide your new manager with a sense of your team's most difficult challenges

**Teach New Skill or Procedure:** The extent to which you teach your new manager a skill, concept, process, or procedure needed to get his or her work done

#### Quick Quiz

Which two activities will have the biggest impact on your new manager's performance?

1. \_\_\_\_\_

2. \_\_\_\_\_

See the next page for answers.

#### Do I Need to Do All Nine Things?

Research shows that by engaging in these nine activities, you can help improve the performance of your new manager. While some may have a bigger impact than others, all of them are important. (The rank order of these activities is available on the next page.) On the next page, you'll see how you can simplify these nine activities by focusing on three roles.

Source: CEB analysis.

New-to-role managers benefit most from direct reports who are flexible, provide a “lay of the land,” and actively offer feedback.

- The nine activities on the previous page fall neatly into three general categories: those that introduce your new manager to how the team works, those that coach your new manager, and those that demonstrate your openness to new ideas.
- By focusing on these three essential roles, you can help ensure your new manager has the knowledge to prioritize the team’s (and your) work, an understanding of the job’s formal responsibilities, and the belief that you are open to new ideas.
- It’s important for you to play an active coaching role here; don’t be a passive participant.
- The more you actively share and actively coach, the better your manager (and you) will perform.

# THREE CRITICAL ROLES FOR YOU

Three Critical Roles for the Direct Reports of New-to-Role Managers

## Role #1: Team Orientation

### Key Activities

- Share Team’s Strengths and Weaknesses
- Share Top Challenges
- Help Leader Learn Team’s Work Goals

## Role #2: Upward Coaching

### Key Activities

- Give Feedback on Ideas
- Help Leader Learn Responsibilities of New Job
- Help Leader Learn Team’s Work Methods
- Teach New Skill or Procedure

## Role #3: Adaptability and Flexibility

### Key Activities

- Be Open to Change
- Be Adaptable

Source: CEB analysis

### Active, Focused Assistance

It’s not enough to be flexible and open to your new manager’s ideas. Being flexible is helpful, but it’s just as important to actively assist your new manager by sharing your knowledge of the team’s strengths and weaknesses and by teaching job-specific policies, skills, or procedures. When you focus on these three roles, you can significantly improve your manager’s performance. As seen on the next page, these activities also provide substantial benefits to you.

## Quiz Answers

### Activities in Order of Importance

1. Share Team’s Strengths and Weaknesses
2. Share Top Challenges
3. Give Feedback on Ideas
4. Help Leader Learn Responsibilities of New Job
5. Be Open to Change
6. Help Leader Learn Team’s Work Goals
7. Help Leader Learn Team’s Work Methods
8. Teach New Skill or Procedure
9. Be Adaptable

Source: CEB analysis.

The activities that have the biggest impact on new-to-role manager performance have benefits for you, too.

- These three roles help improve your new manager's performance, but there are substantial benefits to you as well.
- As your manager becomes more effective, you'll have clearer expectations, smarter priorities, and fewer work disruptions, and your willingness to help will position you as a trusted advisor.

**Tools to Help You Help Your New Manager**

- Interview Guide for Your New Manager p. 15
- Questions to Expect from Your New Manager p. 16
- Welcome Letter Template p. 17
- Tips for Delivering "Upward" Feedback p. 18

# THREE CRITICAL ROLES FOR YOU

Three Critical Roles for the Direct Reports of New-to-Role Managers

## Role #1: New Team Orientation

**Key Idea: Help Your Manager Make Decisions Based on Facts, Not Assumptions**

### Key Activities

- Share Team's Strengths and Weaknesses
- Share Top Challenges
- Help Leader Learn Team's Work Goals

### Benefits to You

- ✓ Your performance and development won't suffer.
- ✓ Projects are assigned based on your strengths.
- ✓ Your manager has realistic performance expectations.

## Role #2: Upward Coaching

**Key Idea: Teach the Skills Needed to Succeed in the Job**

### Key Activities

- Give Feedback on Ideas
- Help Leader Learn Responsibilities of New Job
- Help Leader Learn Team's Work Methods
- Teach New Skill or Procedure

### Benefits to You

- ✓ Disruptions to your work are minimal as your manager gets up to speed quickly on how to do the job.
- ✓ Your manager is focused on the big picture and can prioritize work appropriately.

## Role #3: Adaptability and Flexibility

**Key Idea: Accept New Ideas and Positive Changes**

### Key Activities

- Be Open to Change
- Be Adaptable

### Benefits to You

- ✓ Positive changes in processes or projects make your job easier.
- ✓ Your manager views your good-faith efforts as evidence that you're an honest and trusted advisor.

Source: CEB analysis.

# ROADMAP FOR THE GUIDE

The Business Case

Why is it critical for you to help your newly promoted manager transition into his or her role?



Focusing Your Time on the Right Activities

Which activities will be most effective in helping your newly promoted manager succeed?



**Increasing Your Effectiveness**

**How can you simplify the transition process for your newly promoted manager (and yourself)?**

# QUICK ASSESSMENT: FOCUSING ON THE RIGHT ACTIVITIES

The following statements are designed to assist you in identifying areas where you can focus your time on activities that have the greatest impact on your new manager's performance. Assess how well you perform these various activities, then list any responses that fall in the gray areas in the box titled "Follow-Up Activities." You can use the resources listed on the right to help you improve at these activities.

	Activity	How Well Do You Do This?		Tools to Help You Improve
		Poorly	Effectively	
<b>New Team Orientation</b>	I let my new manager know my own strengths and weaknesses.	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> <li>Interview Guide for Your New Manager (p. 15)</li> <li>Questions to Expect from Your New Manager (p. 16)</li> <li>Welcome Letter Template (p. 17)</li> </ul>
	I let my new manager know our team's most difficult challenges.	<input type="checkbox"/>	<input type="checkbox"/>	
	I help my new manager understand our team's long-term work goals.	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Upward Coaching</b>	I provide my new manager with feedback on his or her ideas.	<input type="checkbox"/>	<input type="checkbox"/>	Tips for Delivering Upward Feedback (p. 18)
	I help my new manager understand the responsibilities of his or her new job.	<input type="checkbox"/>	<input type="checkbox"/>	
	I explain the methods I use to get my work done to my new manager.	<input type="checkbox"/>	<input type="checkbox"/>	
	I help my new manager learn a new skill or procedure he or she needs to effectively do the job.	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Adaptability and Flexibility</b>	I have been open to my new manager's ways of doing things.	<input type="checkbox"/>	<input type="checkbox"/>	
	I have been able to manage multiple priorities and make the most of the resources that are currently available to me.	<input type="checkbox"/>	<input type="checkbox"/>	



## Follow-Up Activities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# NEW-TO-ROLE MANAGER ORIENTATION: INTERVIEW GUIDE—QUESTIONS TO ASK YOUR NEW MANAGER

This short questionnaire will help you, the direct report of a new-to-role manager, during your orientation meeting with your new manager. Your new manager is expecting to be asked many, if not all, of the questions below in some form or another. By using this template, you will reduce the time it would otherwise take you and your new manager to get to know one another, to clarify expectations and operating styles, and to correct false assumptions.

## Management Philosophy

1. How would you describe your management and leadership style?
2. What are the top priorities for this team?
3. What is your definition of a “top performer”?
4. What are your goals for the organization?
5. What does “success” for this team look like to you (i.e., how you expect this team to help contribute to the goals of our organization)?
6. What is your general philosophy on performance management?

## Personal Work Preferences and Characteristics

1. What led you to this team and organization?
2. What is your preferred method of how we communicate with you?
3. How do you like to be approached regarding an issue or challenge with a particular project?
4. How often do you want to meet with us as a team or on a one-on-one basis?
5. What are you most looking forward to or excited about with regard to this new role?
6. What additional information would help us get to know you?
7. What is the best way for us to share feedback on the team’s strengths and weaknesses?

Source: CEB analysis.

# NEW-TO-ROLE MANAGER ORIENTATION: PREPARATION TEMPLATE— QUESTIONS TO EXPECT FROM YOUR NEW MANAGER

This short questionnaire will help you, the direct report of a new-to-role manager, prepare for an orientation meeting with your new manager. You can expect to be asked many, if not all, of the questions below in some form or another. By thinking about these questions and your answers to them before sitting down with your new manager, you will be able to shorten the time it will take him or her to get to know your strengths, your role, your goals, and your expectations.

## Explaining Your Role

1. What are the biggest challenges in your role?
2. What are your biggest strengths?
3. What are your biggest opportunities to develop?
4. How do you interact with other people on your team, other teams, business units, and customers?
5. What do you believe your manager should expect of you?
6. What are your expectations of your manager?
7. What are the benefits of doing the projects you are committed to? Are they living up to your expectations? If not, how can you and your new manager work together to draw out those benefits?

## Revealing Your Personality and Work Style Preferences

1. What excites you most about your job?
2. What motivates you to do a good job?
3. How do you tend to communicate best with your manager? Via e-mail, phone, or in person?
4. How do you prefer to receive assignments (e.g., with time to review the project goals and responsibilities before returning with questions)?

## Discussing Your Transition-Related Concerns or Issues

1. What are you most looking forward to during this transition?
2. What are your greatest concerns about this transition?

Source: CEB analysis.

# NEW-TO-ROLE MANAGER ORIENTATION: PREPARATION TEMPLATE— WELCOME LETTER TO YOUR NEW MANAGER

The following “Welcome Letter to Your New Manager” template will help you establish a relationship with your new manager and create a smooth transition for both of you. Please note that this is only a suggested format. As you make changes to personalize the letter, please keep three things in mind:

- **Be Upbeat**—Focus on how excited you are to be work with your new manager.
- **Be Brief**—It’s very helpful to provide your new manager with a description of who you are and what you do. At the same time, be careful about going overboard. Focus on a handful of the things that really matter most.
- **Be Helpful**—As a member of the team, you obviously have a lot of knowledge about the formal and informal ways work gets done. Offer to share these with your new manager.

Dear \_\_\_\_\_,

My name is \_\_\_\_\_ and I will be a member of your team when you join us on \_\_\_\_\_. I would like to personally welcome you to the \_\_\_\_\_ department and let you know how excited we are to have you join us. I also want to take the opportunity to briefly tell you about myself, the projects I’m working on, and how I can help you make a smooth transition to our team.

I have worked at (company name) for \_\_\_\_\_, and I’ve been a member of this team for \_\_\_\_\_. Prior to my experience with this team, I (provide a brief description of your work history).

This is an exciting time at (company name), and our team is currently hard at work on a number of important projects and initiatives. Among these is a project I am currently working on, where we (briefly describe project or the major activities of your day-to-day job). We are eager to hear your ideas and input as to how we can make this project even better when you join us.

I know that when you arrive you will be quite busy learning about our company, meeting your new colleagues, and understanding our team’s work priorities, our strengths, and how we work. To help speed up this process, our team would like to schedule a get-to-know-you session where we learn your work preferences and you learn ours during your first week.

In addition, I would like to meet one-on-one to discuss my projects and work priorities. As important, though, I’d also like to learn your thoughts on how I can help you transition into your new job; I’m 100% committed to helping you get on board as quickly as possible.

Although you don’t officially start until \_\_\_\_\_, please feel free to contact me if you have any questions before then. I look forward to meeting and working with you.

Sincerely,

# UPWARD COACHING: TIPS FOR DELIVERING FEEDBACK TO YOUR NEW MANAGER

As your new-to-role manager adjusts, your feedback can serve as an important tool to ensure a successful transition. However, many employees feel uncomfortable delivering feedback to their direct managers, particularly if any of that feedback is negative. The following five tips are designed to help guide you through these delicate conversations as you provide your manager with the guidance he or she needs to succeed.

- 1 Focus on What Is Already Working, Not Just What Needs to Be Improved:** Managers not only need to know where they can improve, but they also need to understand what they do well. By engaging in a discussion that focuses on what's working while addressing one or two areas for improvement, you can leave your manager feeling that your feedback has been fair as opposed to critical.
- 2 Know Your Boundaries:** Your manager was selected for this role because he or she has demonstrated the skills required to succeed in that role. For this reason, your feedback should focus more on your manager's relationship with the team or work assignments (which you are qualified to discuss) as opposed to criticizing the team's strategic direction or long-term planning (which may be best addressed by your manager's manager). Only raise these issues if you 1) have very serious concerns and 2) are ready to propose actionable solutions.
- 3 Be Nonjudgmental:** Although it can be difficult to provide unbiased assessments of your new manager's performance, you can go a long way toward creating the impression of a lack of bias by making your presentation as unemotional as possible. Don't focus on emotion, focus on facts.
- 4 Give Concrete Examples:** To provide context for your points, provide examples that support your feedback. For example, rather than saying "you have had great ideas," note how a particular idea saved the team time, money, etc. The use of facts will give your feedback greater weight.
- 5 Focus on the Future, Not on the Past:** Your new manager will probably make some mistakes in his or her first few months. Focusing on these mistakes, however, is not productive, as the past cannot be changed. Offer ideas and strategies that can make your team stronger in the future.