

Member's Quarterly

Spring 2023 Edition

Ask the Expert

You are the New Boss of your Former Teammates: Now What?

Critical success factors

Gail Boone
MPA, CEC

Next Stage Equine
Facilitated Coaching

Q | *You've just become the new manager of the team you left behind. What are some critical success factors early in the appointment to ensure positive relationships and continuing success?*

A | *First, know yourself. Learn as much as possible about how you lead before making the shift. Develop your self-awareness, social and emotional intelligence. Managing your responses to challenging situations will be necessary, especially in the early days when everyone is trying to figure out the nuances of the new reporting relationship. Understand that everyone will be watching what you say and do to take their cues on what to expect and how to show up.*

Have a clarifying conversation with your new boss. Ideally before you begin the role, have a conversation with your new boss to understand their expectations. Ask what's working, what needs to be shifted, what processes are redundant and what they would like to see started. Establish a regular meeting schedule to discuss your transition and how things are evolving.

Understand your role has shifted. Overnight you've moved from subject matter expert to assuming responsibility for the team's performance outcomes. Take time to figure out what that means and how you will avoid the temptation to do it yourself because you know how and it might be quicker than asking someone else.

Don't try to be everyone's friend. You will have had different relationships with coworkers as a team member. Figure out how those relationships will need to shift. Discover your bias—no more lunches with your 'bestie' to the exclusion of everyone else. Make sure not to ignore the one(s) with whom you did not spend as much time or see eye to eye. Be careful not to default to trying to be friends with everyone.

Host individual conversations to establish relationship contracts. This discovery time is about building relationships. All work gets done through relationships. When they are strong and positive, the team is solid. Talk to everyone individually and then together as a group. Ask each team member what they need from you, tell them what you need from them and ask how you will get back on track if one or the other's needs are not being met.

Talk about the culture of the team. Celebrate the positive and name what needs to shift. Culture is often seen and felt but not named. Name it. Work with the team to identify the necessary behaviour to create the workplace where people want to be. Ensure individual and team skill development on the requisite behaviours.

Be clear about performance expectations. Help each team member understand what they need to do to align with the organization's mission and vision. Ask them how they like to receive feedback and establish a regular check-in schedule. Don't wait until something goes off the rails to have a conversation. Once you've talked to everyone individually, have a meeting with the entire team to review.

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Address performance challenges early. It's not uncommon to discover a team member's performance challenges early into your new role. You may not have known of these challenges before. Please don't wait for it to get better on its own. It won't. Address it in an authentic and respectful way, allowing you both to discover something new. Make sure you ask and understand what is required to help the employee be successful.

Establish positive relationships with your new peer group – other managers. Learn from managers who have higher positivity and productivity outcomes. Ask questions and watch how they do things to discover what aligns with your preferred leadership style. Ask them to share their biggest learnings as they transitioned to the new manager role.

Find a mentor and hire a coach. The mentor is someone who has been there and done that. They function as the trusted advisor, whereas the coach functions as the thinking partner whose role is to enable you to discover your full potential.

Pay attention to your needs outside the workplace. Everyone brings a packed bag to the workplace. All of what we experience, think and feel as a result of the other hats worn outside work comes to work. Be sure to have a balance that includes plenty of 'me time' - things that fill you up and counter the demands of everyday life.

Appreciate that this will take time. The shift from being the one doing to the one leading the doing can be a positive experience when the leader does the work to set themselves and others up for success. It doesn't happen by itself. When it goes well, it is rewarding for everyone involved. Eventually, all will find a new rhythm especially if the approach is of good intent.

Gail Boone is an Executive Coach and Owner of Next Stage Equine Facilitated Coaching and can be reached via email at gailboone@ns.sympatico.ca.