
Name

Trio Member emails

New Manager Program

Participant Workbook

Agenda

Day 1	Day 2
Kick-off Speaker Introductions Mindset & Values	Manager Transition Coaching
<i>Lunch</i>	<i>Lunch</i>
Emotional Intelligence	Feedback Decision Making Closing

Turning Values into Mindsets You Can Practice

Instructions

Now that you've identified your own most important values, consider the following:

- Which value(s) currently influence the mindset with which you manage your team?
- Are there others on your list that you can intentionally practice as a mindset?
 - What might this look like in action?
- In your role as a manager, when are your values challenged?

Please use the table below to reflect and jot down your ideas:

Values (as Mindsets)	What does it look like in action?	When is this value challenged?
<i>My highest value is:</i>		
<i>My 2nd highest value is:</i>		
<i>My 3rd highest value is:</i>		
<i>Another value I'd like to practice as a mindset is:</i>		
<i>Another value I'd like to practice as a mindset is:</i>		

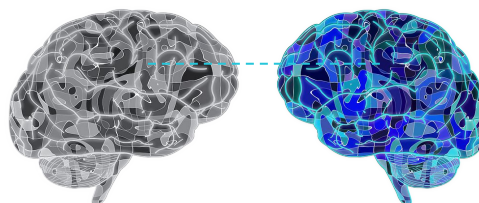
Emotional Intelligence: Cultivating Empathy & Compassion

How can I cultivate compassion?

- Ask how you can help, don't assume you know what's wanted
- Look for commonalities with your directs
- Encourage cooperation instead of competition in your team
- Cultivate a genuine curiosity about the individuals on your team
- Lead by example- treating others with compassion is contagious!
- Be mindful of boundaries— avoid being an emotional sponge

Why cultivate compassion?

- Too much empathy can cause stress & burnout for the empathizer
- Same brain regions are activated in the person suffering & empathizing
- VS. compassion, which instead produces feelings of concern, warmth, and motivation to help the other person
- Compassion training can lower stress hormones, boost immunity, and may even reduce your risk of heart disease



Ask yourself:

Who in my life do I most need to develop more empathy towards? How might I demonstrate compassion towards them?

Turn to a partner and discuss:

What could you do to **increase empathy & compassion** towards those you work with? (e.g. your directs, your manager, clients, or your peer colleagues?)

"So compassion is empathy in action. It is based on a wholesome desire to connect with others and to meet their needs. The best way to understand what compassion is, however, is to see how it actually leads, in practice, to renewal of both leaders and those around them, and ultimately to sustainable resonance and results"

— Resonant Leadership by Richard Boyatziz & Annie McKee, p. 180

Triggers Activity with Trios

Instructions

Think back to a situation at work when you experienced high stress, and/or negative emotion – to the extent that your ability to perform was compromised.

Jot down

- What were you experiencing? Were there any physiological signs?
- Could you pinpoint what triggered you [at the time]?
- What did you try to do? How did it go?

In your trios, take ~ 2 mins each to share your experiences

Four Types of Reappraisal



Reinterpreting

"How can I take the threat away from this situation?"

Coaching Questions:



Normalizing

"It's OK because others feel this way too"

Coaching Questions:



Reordering

"I'm going to think about the value I'm putting on this"

Coaching Questions:



Repositioning

"I'm going to consider this from another perspective"

Coaching Questions:

"When you change the way you look at things, the things you look at change."

– Max Planck (1858-1947)

How to Manage Your Former Peers

Amy Gallo, December 19, 2012 Harvard Business Review

Harvard Business Review. "How to Manage Your Former Peers" by Amy Gallo, December 19, 2012.
<https://hbr.org/2012/12/how-to-manage-your-former-peer/>

Paste article text here once you've received permissions from permissions@harvardbusiness.org

Navigating Your Manager Transition

1. (On your own) Are you managing any former peers in your new role?

(The following questions can be answered even if you are not currently managing former peers)

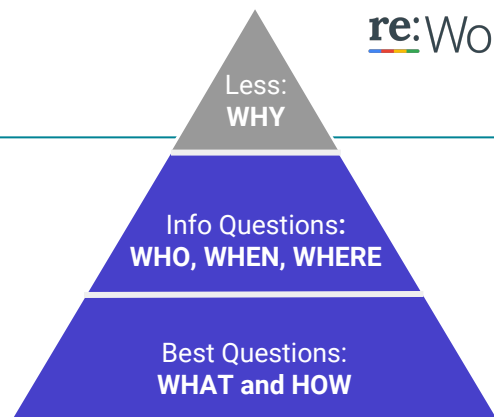
- a. How effective have you been so far in handling the transition?
- b. What has been the most challenging? How might you overcome these obstacles?
- c. What, if anything, might you do differently moving forward?
- d. Who can you go to for coaching or support during this transition?

2. (In your trio) Share the circumstances around the transition into your new manager role.

Discussion questions:

- a. Did anyone receive some good advice surrounding the transition?
- b. In what ways has your manager been supportive? How could you ask/influence him or her for further support, if necessary? (Or, someone else?)
- c. Does anyone have notable stories about managing former peers (i.e. addressing competitors, experimenting with your new persona)?
- d. Did the HBR article resonate with you? Why or why not, specifically?
- e. What have you gained or found rewarding in the transition to your new role?

Coaching Skills and GROW Model



1. Be fully **present** for and **focused** on the coachee
2. Be aware of your own **mindset** and that of the coachee
3. Practice **empathic listening** (*aka active or reflective listening*)
4. Ask **open-ended questions** to facilitate coachee's own insight

Stage 1–GOAL	Stage 2–REALITY	Stage 3–OPTIONS	Stage 4–WILL
Help coachee articulate a specific meaningful goal, including what success would look like. It's rare to uncover the most meaningful / impactful goal in the first telling. It is the coach's job to delve more deeply to clarify the goal further.	Help coachee articulate the "here and now" so s/he can map the journey to the goal. Watch for trying to gather too much data; as coach you only need to understand general dynamics, how coachee interprets the situation, and the impact on him/her. Provide objectivity and invite coachee to see the situation from different angles.	Help coachee brainstorm a list of potential actions to move toward goal. Go for <i>quantity</i> rather than <i>quality</i> of ideas; quality eval comes later. Encourage creativity and brainstorm ALL potential ways to achieve goal before deciding on actions. Offer your ideas <i>after</i> coachee exhausts his/hers. Attribute equal weight to all ideas.	Help coachee determine specific action plan s/he "owns" and follows to achieve the goal. This stage is about forward momentum and converting the discussion to a decision. Allow coachee to select relevant actions and decide how they want to be accountable.
SAMPLE QUESTIONS			
What do you want, desire, or need to overcome? What are your interests, values and motivations? What will success or achievement look or feel like? When will you know you have succeeded? How will you know you have succeeded? How important is this to you?	Where are you now with this topic? What makes you think that? What would your peers say about it? What obstacles are currently in the way of your success? What resources do you need to achieve your goal?	If your biggest obstacle wasn't there, what would you do? If you had endless resources, what would you do? What would your best friend, manager, or peer want or do in this situation? What can you do right now to further develop skills that would be useful in reaching your goal? What have helpful mentors done that has helped you progress?	What will you do? On a scale of 1-10, how committed are you to doing this? (<i>If 6 or below, ask what would bring them to an 8-10.</i>) What obstacles could arise? How will you overcome them? When will you start? How will you and I know it's been achieved or completed? Who will you ask for feedback after you've taken action? What advocacy would help? How can I provide more support towards your development?

Focused attention on coaching is more important than the time spent. What matters most is listening so the other person feels heard. Eliminate distractions and cultivate a sense of presence in the moment.

– Ed Batista, *Keys to Coaching Your Employees*, Harvard Business Review (March 2014)

Coaching practice in trios

Practice (12 mins per round)

- Choose COACH, COACHEE and OBSERVER roles
 - COACH: Coach the COACHEE
 - OBSERVER: Watch and take notes
- When time is up, debrief. Then, switch roles.

Debrief (3 mins per round)

- Debrief roles:
 - OBSERVER: share your observations and feedback
 - COACHEE: share feedback including biggest strength and biggest development area for this Coach
 - COACH: write down what you learned - what do you want to remember from this session?

Round	Coach/Observer notes
1	
2	
3	

Feedback

Write down the two most impactful pieces of feedback you've given to a member of your team in the last month (or longer if necessary).

How did you deliver this feedback?

Preparing for a Feedback Conversation

Instructions: Think of a direct report (or someone else) that you have feedback you would like to deliver to them and then answer the following questions:

1. What is your **intention** in sharing this feedback with them?
2. What would be a **successful outcome** of this feedback conversation?
3. What was the **SITUATION**?
4. What was the **BEHAVIOR** (what did the person do)?
5. What was the **IMPACT** of the behavior on you and/or others?
6. What **data** do you have to support what you will say?
7. If you are emotionally charged about the feedback, how can you personally prepare for the conversation? What words can you use to start the conversation? Where and when will you have the conversation?
8. How might they react or respond to this feedback? How will you prepare for this?

"The bugle blast of evaluation can drown out the quieter melodies of [advice] and appreciation. The evaluation conversation needs to take place first...We can't focus on how to improve until we know where we stand (44)."

— *Thanks for the Feedback* by Douglas Stone & Sheila Heen (2014)

Try it in Trios: Using SBI

On your own:

- **Reflect & prepare** using questions in workbook (5-10 mins)

In **NEW** trios, take turns playing the roles of **Manager**, **Direct**, and **Observer**:

- **Manager Explain** context to trio members (2 mins)
- **Manager & Direct Practice** feedback conversation (5 mins)
- **Observer & Direct Give** at least 1 suggestion or observation (2 mins)
- **Manager & Direct Practice** the feedback conversation *again* (5 mins)
- **ALL Debrief** and provide meta-feedback (5 mins)

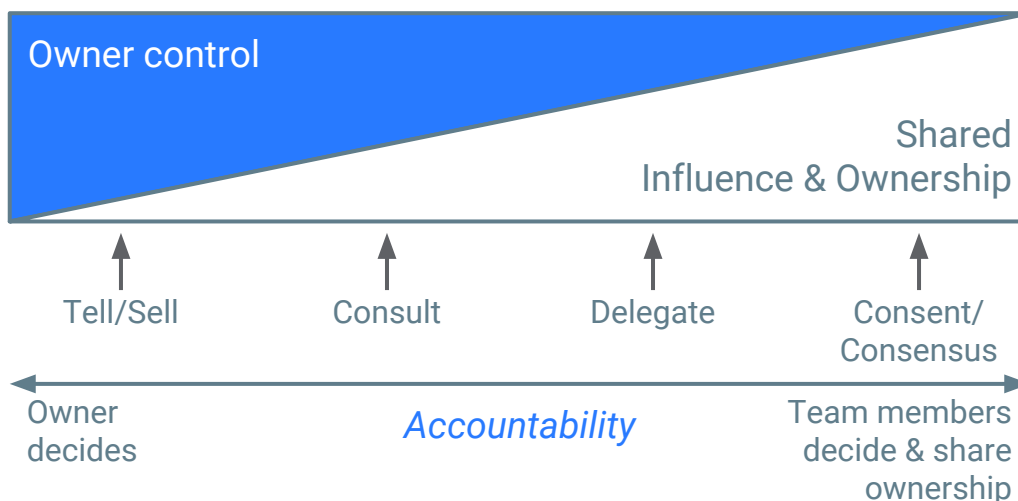
Round	Direct/Observer notes
1	
2	
3	

Situation	Behavior	Impact
describe the Situation	the behavior (what they did)	and the Impact of that behavior



then discuss & clarify, create options, agree on next steps

Decision Making Styles



Style	Could sound like...	Best Suited For...
Tell	<i>Let's do X.</i>	<ul style="list-style-type: none"> • Time critical; leader retains all control of final decision • Simple decision that needs to be acted on quickly • Limited impact to team • Leader has sufficient data or knows pertinent information • Members' interests or objectivity will be compromised
Consult	<i>Thanks for your input. I propose X. Anyone disagree?</i>	<ul style="list-style-type: none"> • Time critical; leader retains all control of final decision • Ideas that need to be tested across the team • Decision has greater impact on team, so involvement is necessary • Members or others have expertise • Leader has ideas they explicitly want input on before deciding • Decision that needs greater buy-in and support
Delegate	<i>I'd like [Person A] to look into this then tell me [the options/what you decide].</i>	<ul style="list-style-type: none"> • Less time sensitive; decision best handled by smaller group without entire team's input • A need for parallel tasks and speed is critical • Smaller group has competence and motivation to take on the decision • Decision/task will develop the individual
Consensus	<i>I'd like everyone to get on the same page about X.</i>	<ul style="list-style-type: none"> • Less time sensitive; decision needs to be jointly owned and supported by team • Decision requires input from across the team • Outcome will directly impact the team in significant ways • Decision may not be implemented unless the team feels they have had a significant contribution in the decision-making process

Decision Making: Desert Survival

It is approximately 10:00 A.M. in mid August and you have just crash landed in the Sonora Desert in the southwestern United States. The light twin engine plane, containing the bodies of the pilot and co-pilot, has completely burned. Only the airplane frame remains. No one else has been injured.

The pilot was unable to notify anyone of your position before the crash. However, he had indicated before impact that you were 70 miles (112 km) south-southwest from a mining camp which is the nearest known habitation, and that you were approximately 65 miles (104 km) off the course that was filed in your VFR Flight plan.

Place a #1 by the most important item, #2 by the second most important, through #15, the least important:

Equipment	Your rank	Team Rank	Expert Rank	Team Error Points
.45 Caliber Pistol (loaded)				
1 Quart (.95L) of Water Per Person				
1 Top Coat Per Person				
2 Quarts (1.9L) of 180 Proof Vodka				
"Edible Animals of the Desert" Book				
A Pair of Sunglasses Per Person				
Bottle of Salt Tablets (1000 tablets)				
Compress Kit with Gauze				
Cosmetic Mirror				
Flashlight				
Jackknife				
Magnetic Compass				
Parachute (red and white)				
Plastic Raincoat (large size)				
Sectional Air Map of the area				

Instructions:

1. **Individually** decide on strategy (1 mins)
2. Meet with **team** to agree on strategy (4 mins)
3. **Individually** rank items (5 mins)
4. **With Team:** Choose 2 facilitators — one for first half and one for second half
 - Agree ranking of items (with first facilitator) 10 minutes
 - **Process Break** (5 minutes)
 - Continue discussion (with second facilitator) 10 minutes

Overcome Bias with Reappraisal

Cognitive & Emotional Attitudes That *Impede*

"I've got to push my point harder, they don't get it."

"What I see is how it is."

"I'm confident I know what's best (and they don't)."

"I know that I'm right and it's my job to convince them."

"They are only interested in what's in it for them."

"I'm getting angry and it's their fault."

"If they can't understand what I'm telling them, then they'll need to figure it out for themselves."

- State views directly, while open to influence
- Be explicit about your reasoning, interests, concerns & conclusions
- Offer examples
- Make points one at a time

Collaborative Mindset Know and Feel to *Overcome*

"I need to slow down my reactive responses."

"What I see is one perspective."

"Those who differ see something I may have missed."

"I'm willing to suspend my agenda so I can better listen to other's views."

"I need to consider the unintended impact I may be having on others."

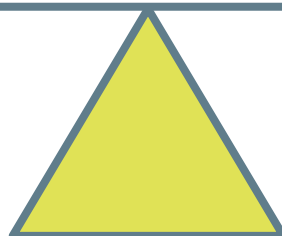
"I'm seeking to validate my own thinking as well as others."

"Our purpose is to make the best informed decision for the company."

- Test your understanding
- Solicit a range of ideas
- Explore other's reasoning, concerns and interest
- Encourage challenge, questions and feedback

Advocacy

Inquiry



Summary

- Synthesize the others' views in your own words
- Test your understanding of the others' concerns
- Capture their full meaning; express their situation

Decision Making Framework

Step	Approach	Relevant Principles
What	What are you solving for and are the objectives clear to everyone?	<ul style="list-style-type: none"> • Address root causes, not situational fixes • Establish priorities for what to tackle (and what's out of scope) • Anticipate outcomes by defining success criteria at the onset • Consider ways to simplify or tweak existing structures and look for solutions that scale
Why	What's at stake (if you do it or don't do it) and why is it important?	<ul style="list-style-type: none"> • Does it solve a business need and/or good for the company longer term? • Is this a good use of time? • Does this fit in with other current priorities?
Who	Is everyone clear who the decision maker is?	<ul style="list-style-type: none"> • Default to open: listen and ask questions • Be generous with providing context—it'll enable others to do their jobs better • Give people the benefit of the doubt and assume positive intent
How	How will the decision be made? (e.g., <i>consensus driven</i> ; <i>how will data be used</i>)	<ul style="list-style-type: none"> • Define your exception criteria (which should rarely apply) • Make tradeoffs explicit • Help scale good judgment by communicating the rationale for the decision after it is made
When	When can people expect a decision?	<ul style="list-style-type: none"> • Be transparent about what decision was made and how it will be communicated • If elements of the decision making process change or are delayed, communicate that to all stakeholders

Add Clarity to Decisions with RACI

Clarifying Roles, Responsibilities and Decision Making:



Action Planning

1. In what area would you like to grow as a manager over the next 6-12 months?
2. What strengths do you already possess in this area?
3. What do you need to focus on, develop or get better at?
4. What are 1-2 activities and/or resources that would help you develop most in this area?
5. What's a good next step to get this going?

Appendix

Table of Contents:

- Values-Based Leadership
- Values Reflection
- The Manager Role
- Getting to Know Your Direct Reports
- Project Oxygen

Values-Based Leadership

Instructions

First, go through this list and circle the personal values that resonate most with you. Next, narrow the list down to 10 or fewer. Finally, rank and number your personal list in order of importance to you.

Accountability	Discipline	Honor	Rigor
Accuracy	Discretion	Humility	Security
Achievement	Diversity	Independence	Self-actualization
Adventurousness	Dynamism	Ingenuity	Self-control
Altruism	Economy	Inner Harmony	Selflessness
Ambition	Effectiveness	Inquisitiveness	Self-reliance
Assertiveness	Efficiency	Insightfulness	Sensitivity
Balance	Elegance	Integrity	Serenity
Being the best	Empathy	Intelligence	Service
Belonging	Enjoyment	Intuition	Shrewdness
Boldness	Enthusiasm	Joy	Simplicity
Calmness	Equality	Justice	Soundness
Carefulness	Excellence	Leadership	Speed
Challenge	Excitement	Legacy	Spontaneity
Cheerfulness	Expertise	Love	Stability
Clear-mindedness	Exploration	Loyalty	Strategic
Commitment	Expressiveness	Making a difference	Strength
Community	Fairness	Mastery	Structure
Compassion	Faith	Merit	Success
Competitiveness	Family-orientedness	Obedience	Support
Consistency	Fidelity	Openness	Teamwork
Contentment	Fitness	Order	Temperance
Continuous Improvement	Fluency	Originality	Thankfulness
Contribution	Focus	Patriotism	Thoroughness
Control	Freedom	Perfection	Thoughtfulness
Cooperation	Fun	Piety	Timeliness
Correctness	Generosity	Positivity	Tolerance
Courtesy	Goodness	Practicality	Traditionalism
Creativity	Grace	Preparedness	Trustworthiness
Curiosity	Growth	Professionalism	Truth-seeking
Decisiveness	Happiness	Prudence	Understanding
Democraticness	Hard Work	Quality-orientation	Uniqueness
Dependability	Health	Reliability	Unity
Determination	Helping Society	Resourcefulness	Usefulness
Devoutness	Holiness	Restraint	Vision
Diligence	Honesty	Results-oriented	Vitality

"As I tell my students, becoming the best kind of leader isn't about emulating a role model or a historic figure. Rather, your leadership must be rooted in who you are and what matters most to you. When you truly know yourself and what you stand for, it is much easier to know what to do in any situation. It always comes down to doing the right thing and doing the best you can."

-Harry M. Jansen Kraemer Jr., Kellogg School of Management

Values-Based Leadership Reflection Questions

Below are some questions that may help you differentiate values that simply resonate with you from those that you truly live and breathe, as well as how you might adjust them, given certain circumstances. Reflecting on these questions and the top 10 values should help you rank them and ideally narrow down your top 3.

- What are your top 3? Briefly describe what they mean to you— we will revisit in class.
- If you awoke tomorrow morning with enough money to retire very comfortably, would you continue to live these values?
- Would you want to hold these values, even if they became a disadvantage or you could be penalized for them?
- Do other people you work with know what you value? How do they know?
- Are there any gaps between what you say you value and what you do (how you act)? If so, how do you account for this gap? When does it occur?

"Personal leadership is the process of keeping your vision and values before you and aligning your life to be congruent with them. -Steven Covey

Your Role as a People Manager

Being a good manager means helping your team achieve its results. It also means rolling up your sleeves and getting the work done on an individual level.

With a **check mark**, (✓) indicate the areas/behaviors in the table below that you feel like you're already doing well in. Then, **circle** the areas/behaviors that you could focus more on in your development as a manager.

Lead	Coach	Advocate	Deliver Results	Administer
<i>Deliver a shared vision and encourage the team to achieve that vision.</i>	<i>Assist team members in setting and meeting their individual development goals, improving performance, and leveraging skills.</i>	<i>Remove roadblocks, build the team's credibility, and positively represent the team to others at the company.</i>	<i>Help the team as a whole be more productive than they would be working individually.</i>	<i>There are tactical things at times that managers need to do.</i>
Behaviors				
Develop and communicate a shared vision, strategy, and priorities with input from the entire team	Set and communicate expectations for new and existing team members	Actively reach out to the team to understand their work and accomplishments	Take responsibility for team's results	Evaluate performance of direct reports and actively participate in calibration
Ensure the team's work is aligned to short- and long-term company objectives	Actively participate in team meetings and conduct regular 1:1s with each direct report	Help the team build its credibility and get recognized for its achievements	Set, document, and measure OKRs	Participate in salary planning, bonus, and equity planning
Motivate and inspire direct reports	Provide actionable and timely feedback to each member of the team	Represent the team interests, challenges, and needs to other relevant stakeholders	Recruit, advance and retain a diverse team	Nominate reports for promotion and communicate committee feedback
Model our culture and positive behavior	Actively manage low and high performance	Anticipate and remove barriers to help your team members do their jobs	Work side-by-side with team to get things done when needed	Determine optimal allocation of people and financial resources based on need and business strategy
Encourage and reward innovation and thoughtful risk-taking	Share your expertise and your network to help build direct's skills	Shield the team from unnecessary burdens or noise	Make timely decisions by driving consent; clearly communicate decision-making rationale	Do the paperwork (approve leaves, timesheets, support transfers, review/approve team expenses)
Anticipate and initiate change, demonstrate resilience and help the team adapt	Learn about direct's developmental goals, strengths, and interests		Develop criteria to assign projects to the team	
Foster transparency in the team; pass information vertically	Advise and assist in identifying or creating opportunities for growth		Remove silos; encourage inter-team project work and shared goals	
			Encourage the team to collaborate and discuss and respect diverse perspectives	

Getting to Know Your Direct Reports: Conversation Guide

STEP 1: Set Up the Meeting

Define the purpose of the meeting and set the intent that you want to get to know your directs better. Desired outcomes of the meeting include:

- Getting to know your report
- Building the relationship
- Understanding the support they would like from you
- Sharing of your career development philosophy and what they can expect from you

Set the tone and objective of the meeting:

- I'd like to spend some time in today's meeting getting to know each other better.
- We've gone through a lot of change recently and I want to understand your work style, your history, what you're passionate about, your career interest and goals, and how I can best support you. We won't cover everything today but I wanted to at least start the conversation.

STEP 2: Get to Know Your Employee

Purpose Start to get to know your employee better and build the foundation of your employee / manager relationship. Remember the purpose is to get to know your employee so listen more, talk less.

Pick the questions that resonate with you. You can also use these questions over several 1:1 sessions.

- *Personal*
 - What are your interests in both work and life?
 - Tell me a little about yourself. Your past work experiences. Where you went to school. The types of trainings you've completed.
 - What are your hobbies? What do you like to do for fun?
- *Work*
 - What is your dream job in 10 years? Would that be different if money was no object?
 - What are some of the accomplishments you are most proud of (personally, in work)?
 - What are some of your biggest challenges?
 - What do you think are your natural strengths and talents?
 - What skills do you currently enjoy using either in your new or old role?
 - What are your current developmental goals?
 - What skills do you think we utilize? What skills do you feel are unused?
- *Working Style*
 - Tell me about your working style.
 - What motivates you?
 - How do you like to be recognized?
 - Who is the best manager you've had and why?
 - How do you like to be managed (e.g., likes structure, loves autonomy, works best alone, wants to be part of a team)?

STEP 3: Open Up the Conversation

Purpose While the objective is for you to get to know your direct report, it is important that they get to know you too.

Ask them: Is there anything you want to ask or know about me?

STEP 4: Wrap Up

Purpose Summarize any action items and thank them for their time.

Wrap up the meeting:

- Thank you for sharing - I learned a lot about you and really look forward to working together.
- I will follow up on ____ as discussed.
- Let's keep this conversation going and remember I am here to support you.

Project Oxygen

Project Oxygen was a study done in 2009 by Google's PiLab that found there are 8 core attributes that great managers at Google have in common. Research done by Gallup confirms similar attributes.

A High-Scoring Manager ...

1. Is a good **coach**
.....
 2. **Empowers** the team and **does not micromanage**
.....
 3. **Expresses interest/concern** for team members' success and personal well-being
.....
 4. Is **productive** and **results-oriented**
.....
 5. Is a good **communicator** – listens and shares information
.....
 6. Helps with **career development**
.....
 7. Has a clear **vision/strategy** for the team
.....
 8. Has important **technical skills** that help him / her advise the team
-

Notes
