

NEW MANAGER TOOLKIT

*Your guidebook to being successful in
your first few months as a leader.*



thetalentleader.com

Introduction

You are a new manager, which means one very important thing: *you are no longer an individual contributor*. You must approach your new position differently than those you have in the past. This will be hard...but remember that you were put in the role for a reason. You will be overwhelmed, and that's okay! The best thing you can do is leverage your first 30 days to set a solid foundation.

You can do this through focusing on five key objectives:

- Building relationships
- Gathering knowledge
- Establishing expectations
- Developing assessments
- Creating a list of pain points

Use the pages that follow to give you a starting point for achieving these objectives. Here is what you will find:

- Key Contact Brainstorming Worksheet (page 2)
- Key Contact Meeting Notes Template (pages 3-4)
- Knowledge Share Note Sheets (pages 5-10)
- Leadership Style Reflection Sheets (pages 11-12)
- Expectations Worksheet (pages 13-16)
- Employee Assessment Template (pages 17-18)
- Pain Points Tracker & Detail Page (pages 19-20)

For more detailed information on how to think about your role, check out our post ***How to Spend Your First 30 Days as a New Manager***. Don't forget to visit our ***resources page*** for more support. As always, you can ***email us*** with specific questions. Good luck, you've got this!

TALENT LEADER

Objective: Build relationships with your team, boss, peers, and other key contacts.

Use this worksheet to develop a list of others in your organization to meet with during your first 30 days in your role. Leverage your manager and peers to help you develop this list.

Be sure to consider:

- *Key Leaders*
- *Peers*
- *Cross Functional Counterparts*
- *Helpful resources (reporting groups, IT, etc)*
- *People with a historical connection to the department*

NAME	DEPT	NOTES

TALENT LEADER

Objective: Build relationships with your team, boss, peers, and other key contacts.

Use this worksheet to take notes as you gather context and establish relationships.

Meeting with: **Date:**

Department:

Tell me about yourself:

Tell me about your department: how is it organized, what type of work is done, and how do you interact with my department & other parts of the organization?

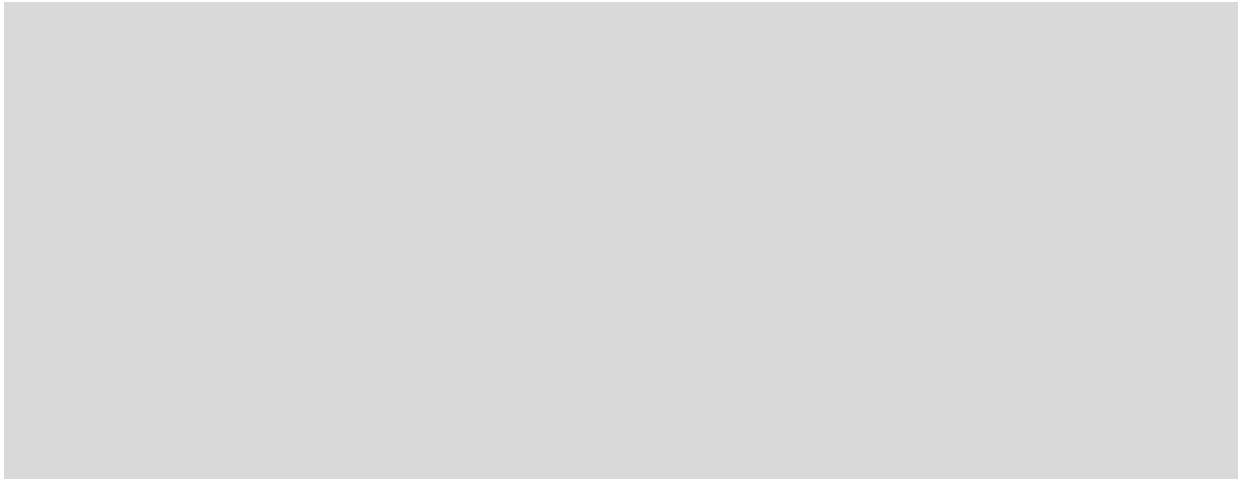
What are some of your current initiatives?

TALENT LEADER

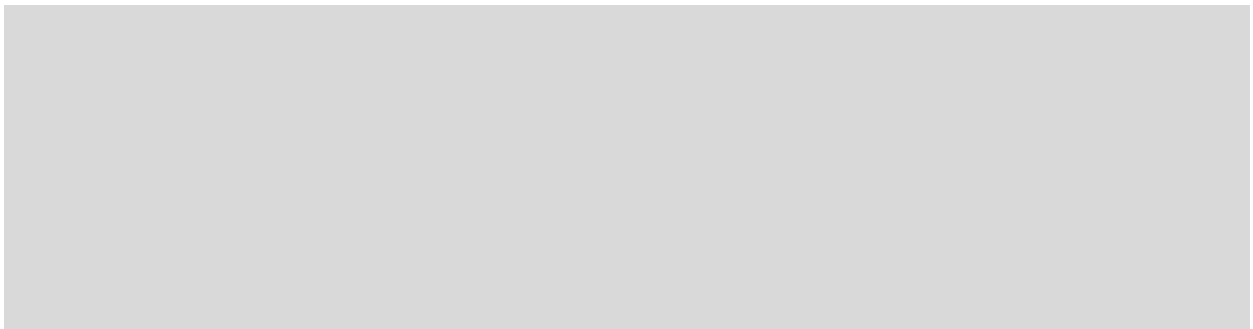
What's your biggest challenge right now?



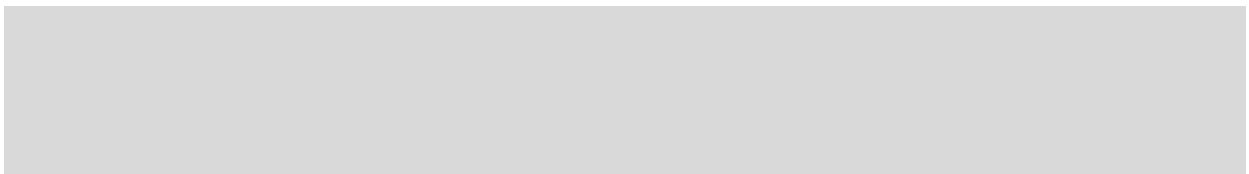
What pain points exist between our two departments?



What advice can you give me as I move into this position?



Who else do you recommend I meet with?



TALENT LEADER

Objective: Gather working knowledge of your department.

Getting a foundational knowledge of your department is imperative. It will be helpful for you to have a solid base as you get more involved in key initiatives and decisions. Below is a sample list of topics/objectives for knowledge shares – remember that these are just a starting point. Work with your manager, peers, and team to get an understanding of the following:

What are the key metrics?

What are the key initiatives?

Department Knowledge (Continued)

What do you need to know about the day to day management of the department?



Who handles which pieces, and why?



TALENT LEADER

Objective: Gather working knowledge of each employee's role.

Meet with each employee, with the objective of understanding the below. This may take a few meetings. You can start with a general knowledge share, and then move to do a few sit-withs to see the items in action. Your objective here is to learn, and you should come at these conversations from a place of curiosity and humility (even if you already think you have an idea of the answers).

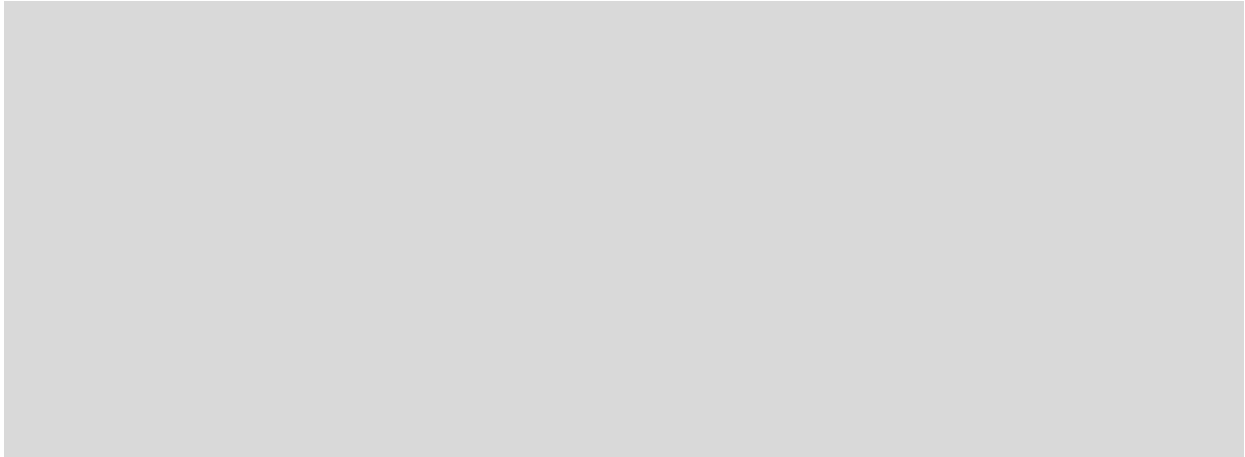
Employee's Name:

What are the day to day activities? Weekly tasks? Monthly?

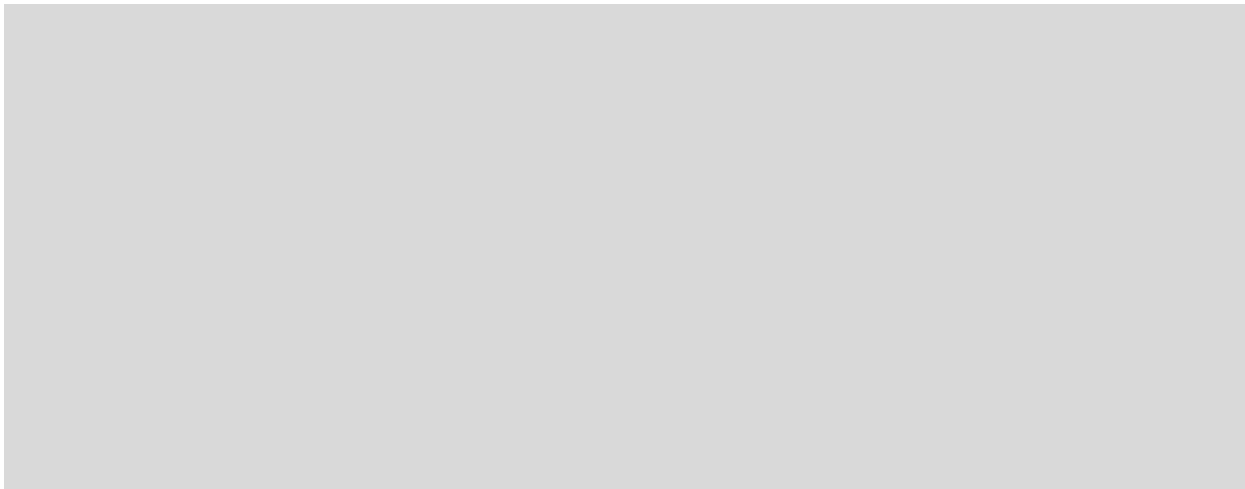
What are the key projects?

Employee Knowledge (Continued)

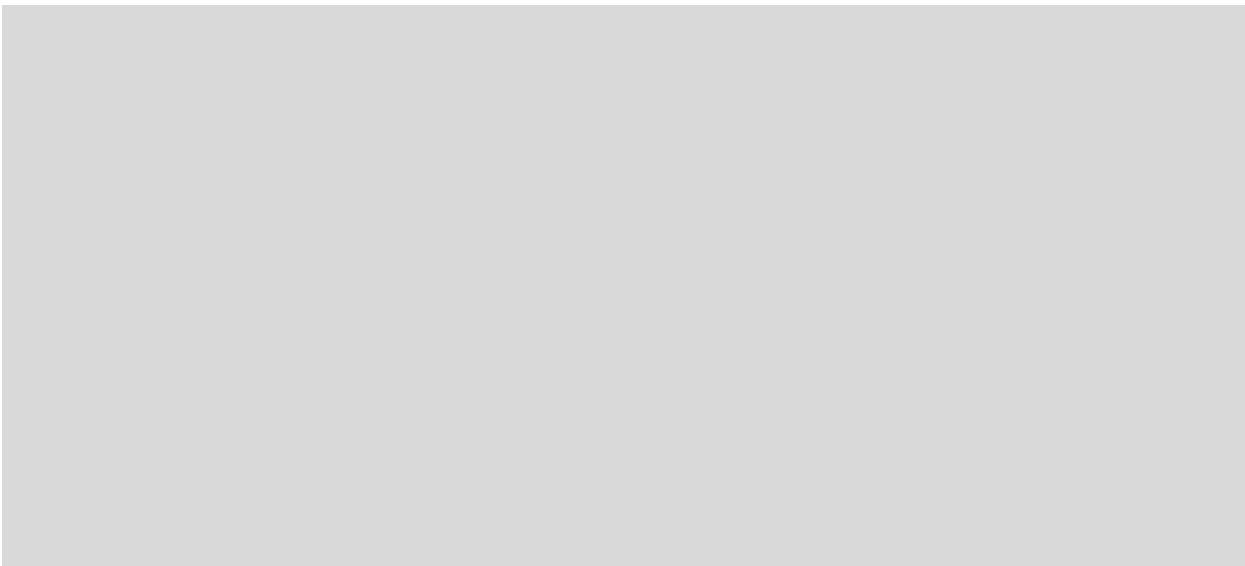
What things does this employee enjoy about their role?

A large, empty gray rectangular area intended for handwritten or typed notes regarding what the employee enjoys about their role.

What are the pain points?

A large, empty gray rectangular area intended for handwritten or typed notes regarding the employee's pain points.

Other notes:

A large, empty gray rectangular area intended for handwritten or typed notes.

TALENT LEADER

Objective: Gather working knowledge on key cross functional areas.

Once you identify key departments your team interacts with, make it a point to get a better understanding of those areas. This will help you more effectively lead as challenges, opportunities, and initiatives present themselves. Below are some questions you should aim to understand the answers to:

Cross Functional Area:

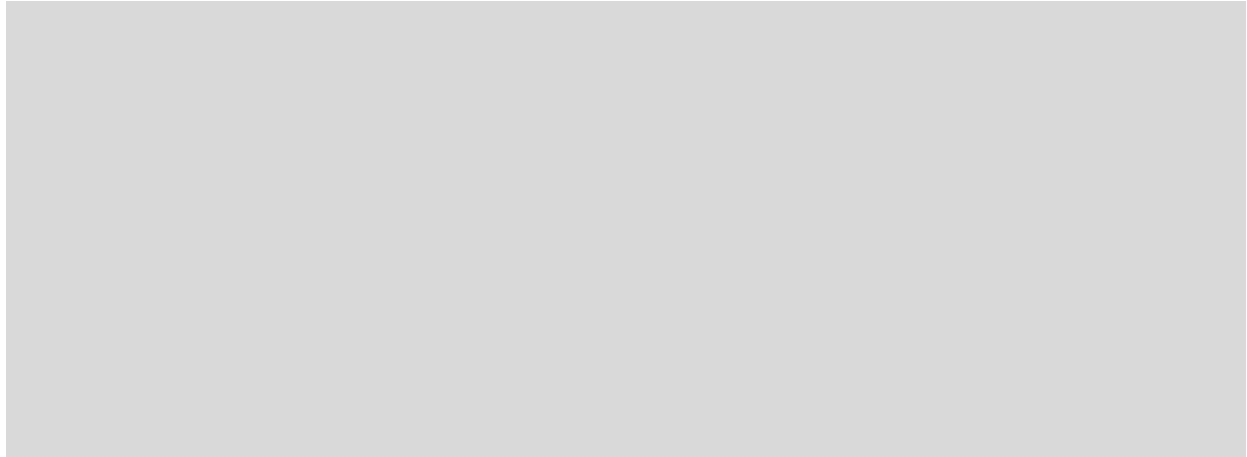
What is the objective of the department? How is the area organized?

What does the day to day look like?

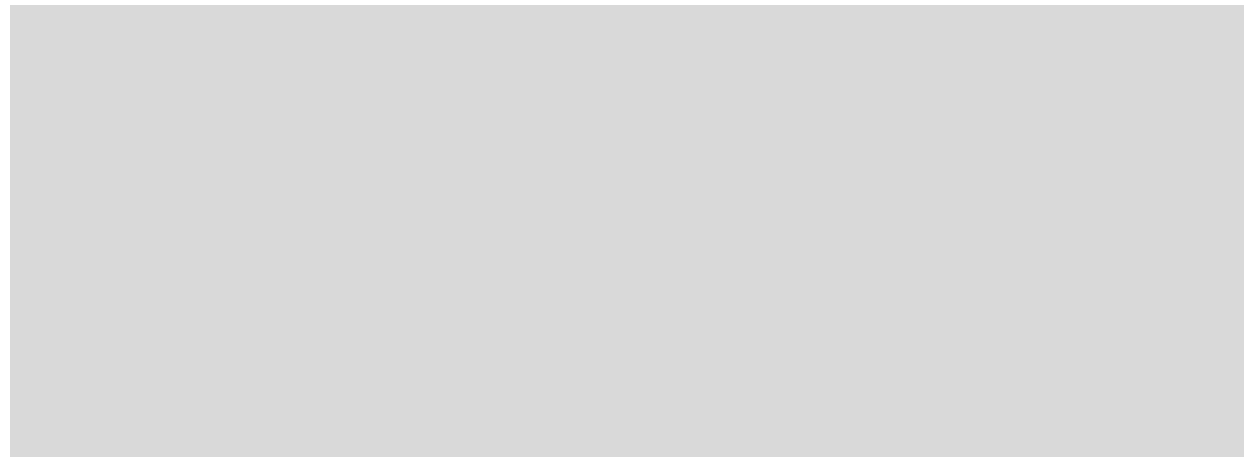
TALENT LEADER

Cross Functional Knowledge (Continued)

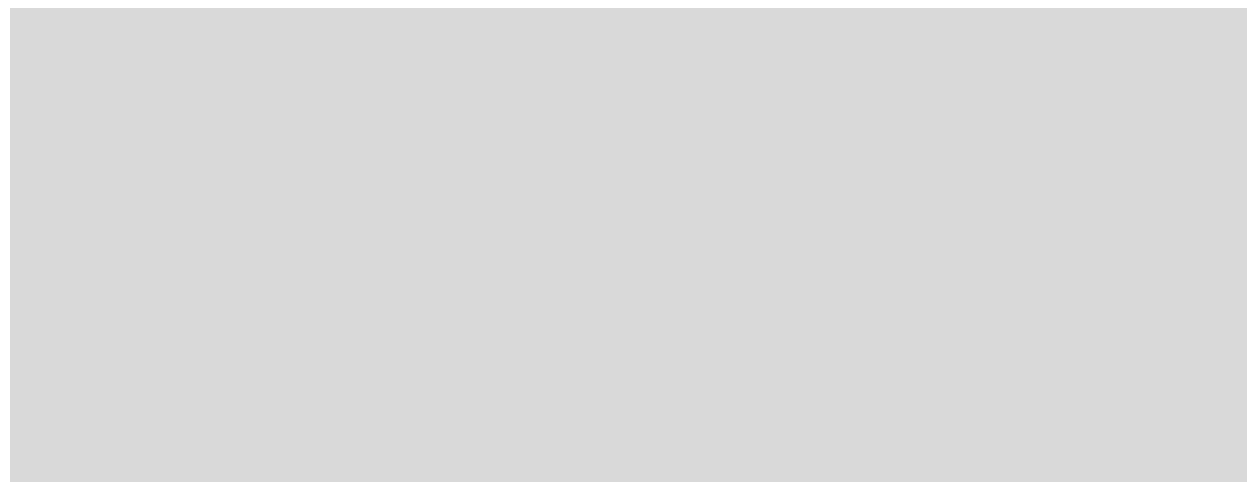
How does this area interact with other parts of the organization?
How does it fit into the bigger picture?



How does this department interact with yours, and vice versa?
What are some common hand-off points?



Other notes:



TALENT LEADER

Objective: Establish your leadership style.

In order to establish your leadership style, you first need to understand what you want it to be. The below prompts are intended for self reflection to help you hone in on the type of leader you want to be. After filling out these worksheets, be sure to review the next steps that follow.

Who was the most effective manager you have interacted with?

List three behaviors they exhibited that made them effective:

Who was the least effective manager you have interacted with?

List three behaviors they exhibited that made them ineffective:

When your employees leave interactions with you, how do you want them to feel?

TALENT LEADER

Objective: Establish your leadership style. (continued)

When your peers leave interactions with you, how do you want them to feel?

List 5 adjectives you feel sum up your desired leadership style.

Combine your answers to write a 30 second elevator pitch of what type of leader you strive to be:

Next Steps:

When you meet with each employee, ask them to come prepared with answers to the first 4 questions. Discuss their answers and share yours, as well. Then share your intentions/answers to the balance of the questions....and ask the employee for their thoughts and feedback. In subsequent one-on-one meetings, ask the employee for feedback on how you are doing towards the discussed intentions. Specific questions you can ask are:

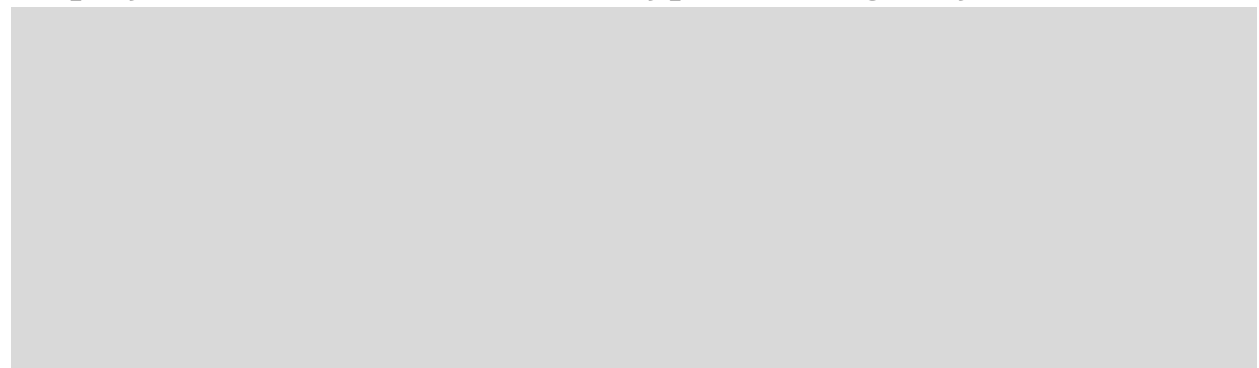
- How do you walk away from our interactions feeling?
- What adjectives would you use to describe the leadership style I'm exhibiting?
- What are 2 things I could do to be more effective?

TALENT LEADER

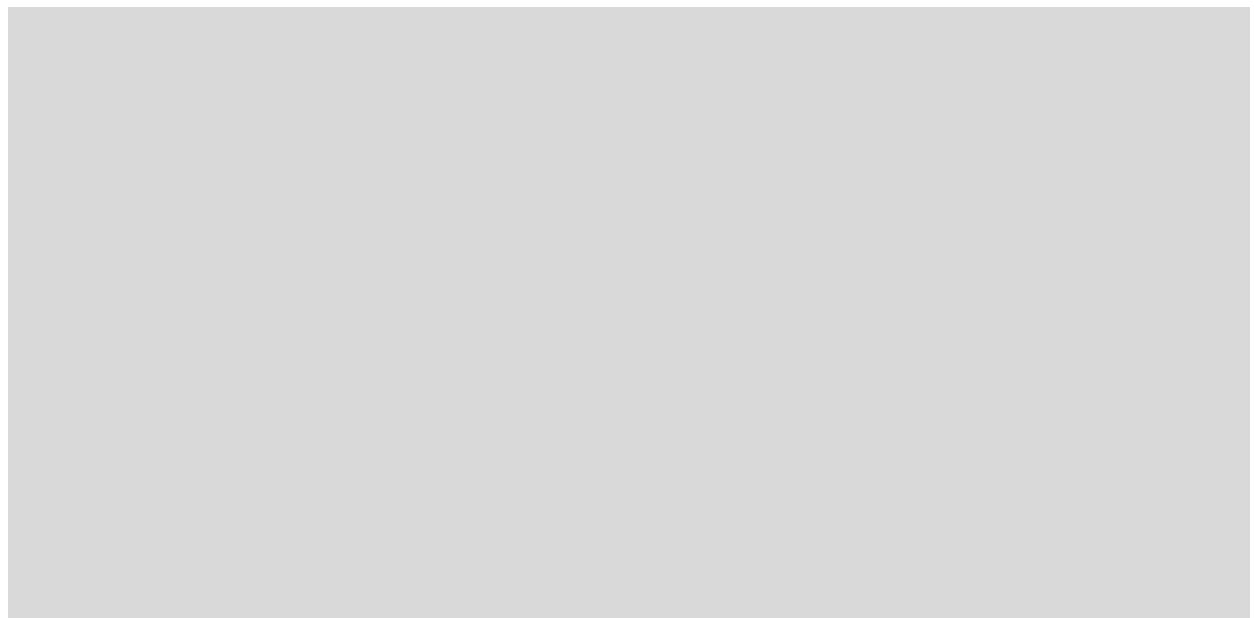
Objective: Establish your expectations.

It may be hard to brainstorm what expectations you have when you are brand new! Instead of thinking about your long-term expectations, start with short term. This will help you open the door to future conversations on expectations, while beginning to establish authority early on. Use this worksheet to help you map out your expectations.

Administrative: What are your expectations around hours at work and time away from work? How would you like your employees to communicate these types of things to you?



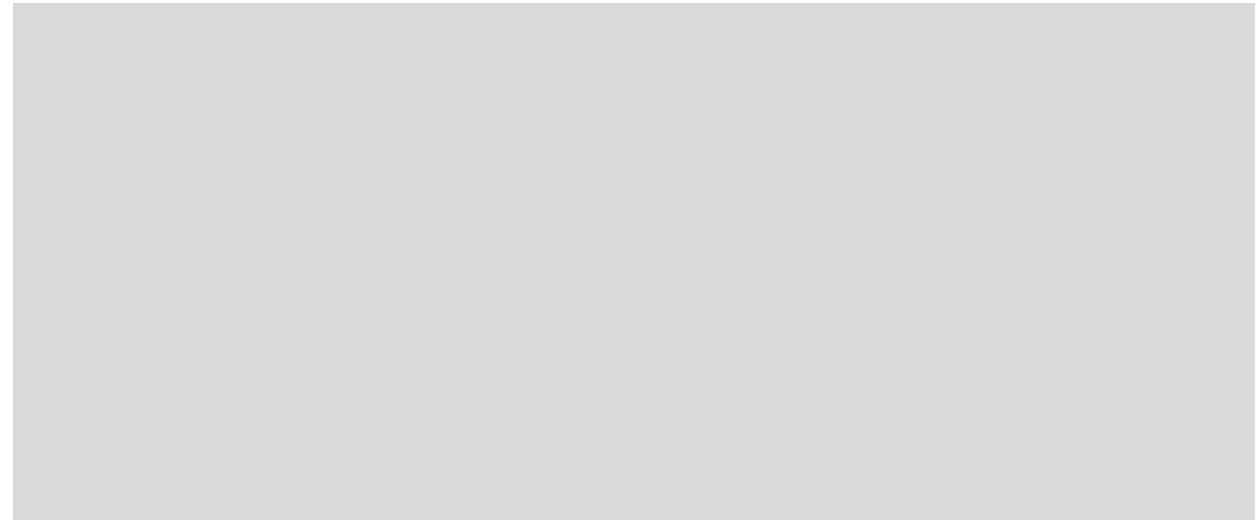
Involvement: What types of things do you want your employees to involve you in, and how, in the first 30 days? Consider emails, meetings, and issues. For each item, also write in what you expect to get out of that involvement (your why). For many of these, the answer may simply be “to learn.”



TALENT LEADER

Objective: Establish your expectations. (Continued)

Workplace culture & work/life balance: What are your expectations around the type of environment you want in the office? Do you expect the team to put in hours outside of the office, and if so, under what circumstances?



As a final step, hold a team meeting to start off on the right foot. The objective of the meeting is to get to know your team, have them get to know you, and for you to share your earliest expectations.

Here is a sample agenda:

- Introductions (Round Robin, with an icebreaker type question such as “what is your favorite food?”)
- Background on yourself
- Interactive activity – break your team up into smaller groups and have them develop “team expectations” for each other and for you, then develop a “team charter” as a group
- Your ground rules and expectations

TALENT LEADER

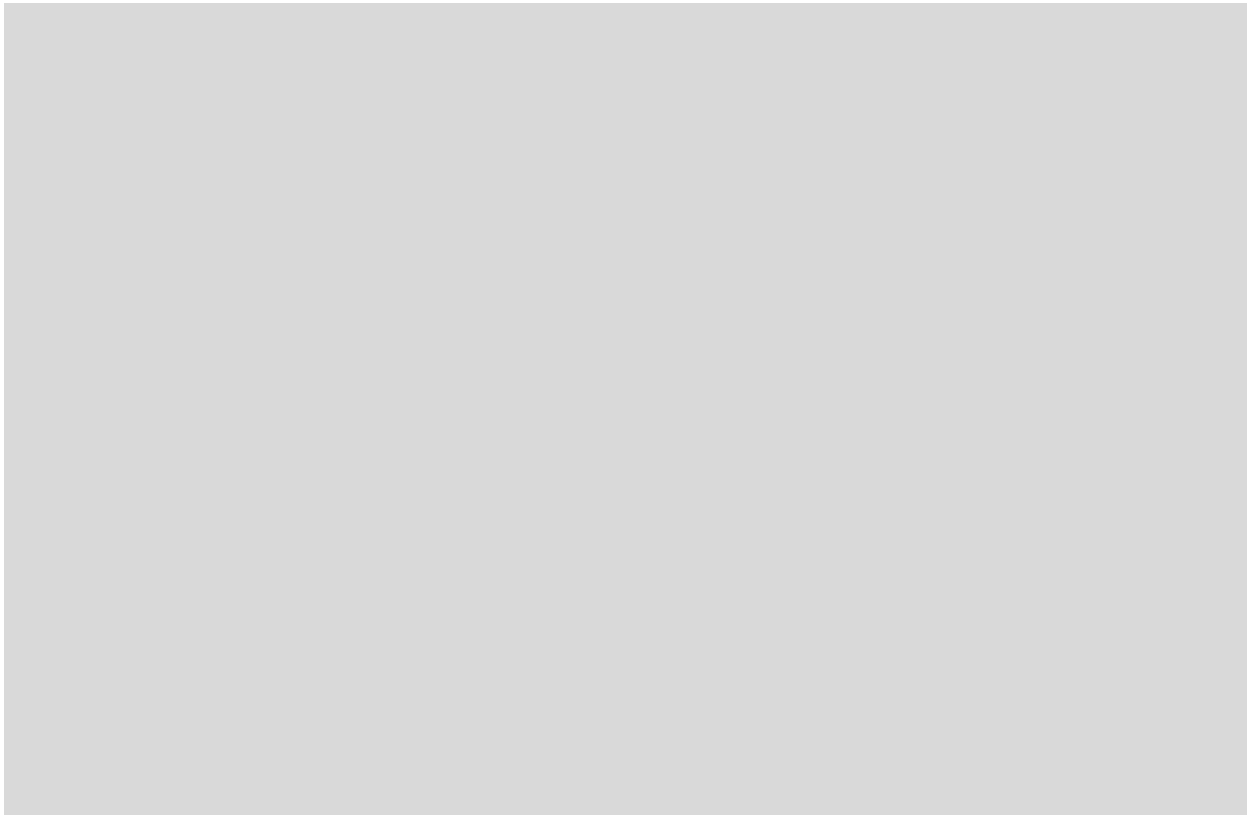
Objective: Understand your manager's expectations.

Use this page to have a conversation with your manager on his or her expectations of you.

Administrative: What are your expectations around hours at work and time away from work? How would you like me to communicate these types of things to you?



Involvement: What types of things do you want me to involve you in, and how, in the first 30 days? What decision are you comfortable with me making on my own, and what do you want me to run by you first?



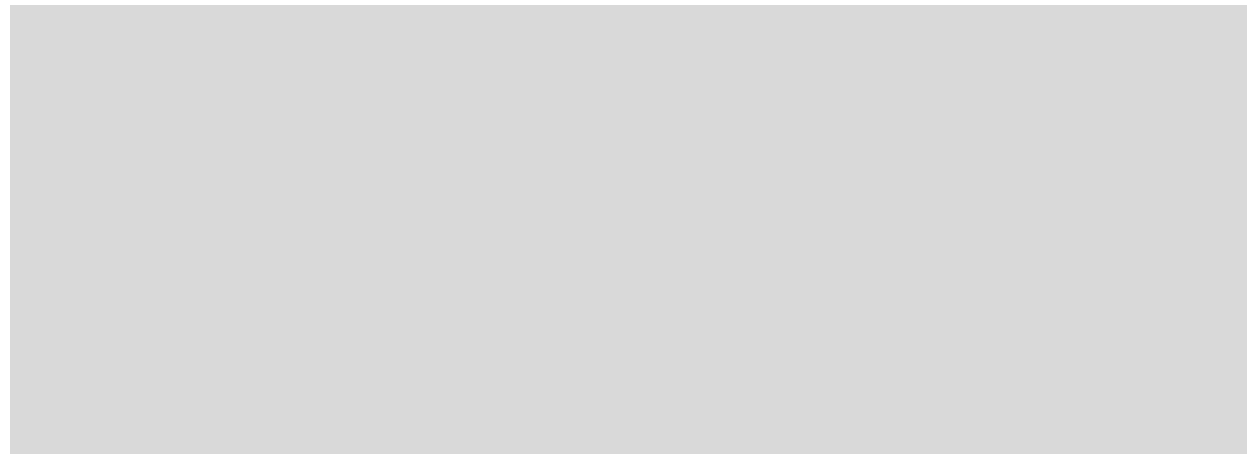
TALENT LEADER

Objective: Understand your manager's expectations. (Cont'd)

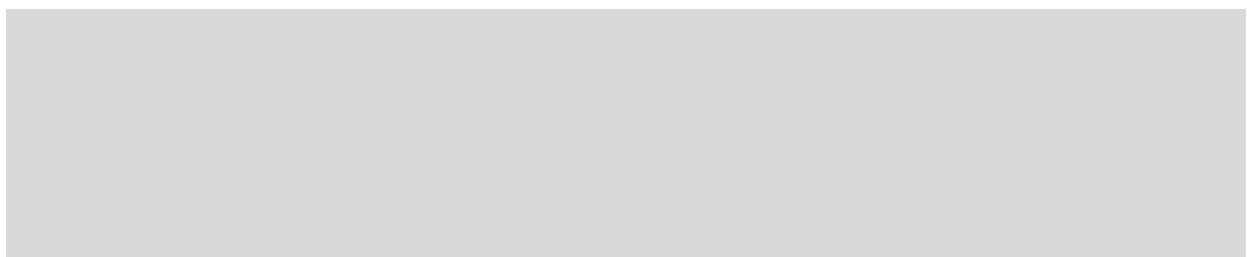
Workplace culture & work/life balance: What are your expectations around the type of environment you want in the office? Do you expect me to put in hours outside of the office, and if so, under what circumstances?



Contribution level: How do you expect me to be contributing after 30, 60, and 90 days?



Check Ins: How often would you like to meet, and how would you like to use that time?



TALENT LEADER

Objective: Develop an initial assessment of each employee.

Use the below prompts to begin to paint a holistic picture of each employee's performance. Leverage your personal interactions, the employee's own self-reflection, peer observations, and past reviews to gather input.

Employee Name:

What is his/her background? How long have they been in this role?

How does he/she contribute to the department and overall business?

What are areas where this employee is very strong? Give examples.

TALENT LEADER

Objective: Develop an initial assessment of each employee.

Employee Name:

What is this employee's long-term career goals?

What skills will be needed to achieve these goals?

What are his/her improvement areas? Give examples.

What would take this employee to the next level?

What are some things you would like to work on with him/her over the next quarter to make a step-change in these areas?

TALENT LEADER

Objective: Develop a list of pain points.

As you move through these activities, you will come across many opportunities for improvement. During your first 30 days, resist the temptation to start “fixing” things right away, unless an item is glaring and you know it is an easy win. Instead, create a list of pain points to visit with your team and manager after you have a solid foundation of knowledge.

Many of these will come out naturally in conversation. However, we recommend you also have a team meeting to execute a barriers brainstorm . This will get your team involved in the process and will allow you to establish credibility as a new manager.

After you have a list of pain points, work with your manager and your team to develop an action plan for each. Again, you should wait until you feel that you have the knowledge to talk credibly potential solutions.

Use the worksheet that follows to write down info for EACH pain point you come across. Alternatively, you can set up a simple Excel spreadsheet to keep track of these.

Pain Point Worksheet

Pain Point:

Detailed Description - who, what, why, when, how

What is the impact of the pain point? Consider money, time, and employee satisfaction:

Would it be easy, moderately hard, or very challenging to solve? Why? How long would it take?

What are the next steps needed?

Next Steps

If you've made it to the end here, hopefully you feel less overwhelmed than when you started! Now that you have reviewed all of the materials, your next step is to develop your own roadmap of activities over the next 4-6 weeks. Look at your calendar and literally create blocks of time for each piece of the toolkit. What activities do you want to tackle when?

Remember that each activity you complete should tie to at least one of these five objectives:

- Building relationships
- Gathering knowledge
- Establishing expectations
- Developing assessments
- Creating a list of pain points

Envision what it would feel like to have strong foundations in relationships so that you know who to go to when you need some help. Imagine sitting in a meeting and being able to follow along with the discussion, and even participate, because you have the appropriate knowledge. Think about how great it will be for your team to loop you in on things appropriately because they are clear on what you expect. Finally, get excited at the idea of having a clear road-map of opportunities to work on in the business, and with individual talent development. By focusing on the objectives above, you can get there!

For more detailed information on how to think about your role, check out our post ***How to Spend Your First 30 Days as a New Manager***. Don't forget to visit our ***resources page*** for more support. As always, you can ***email us*** with specific questions. Good luck, you've got this!