

THE NOTES OF FIRST LINE MANAGER

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The author shares personal thoughts on different aspects of first line manager (FLM) role within the organization. This book offers honest and open overview of personal FLM experience. It's based on real stories and situations and shares some advices for those who is in this job and/or interested in being a first line manager. It is a practical handbook made to encourage people managers to apply creative approach in managing their teams.

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1. Introduction

I am managing the team. . . . For those of you who have had experience to do that it is evident that we are speaking about hard job. Every day you have to deal with people. People makes the difference. We have heard this phrase many times but each manager treats it differently. I strongly believe that each team I worked for helped me to be successful. Their success and their stories changed me, my behavior and companies we worked for.

Let me start with introduction. I have got scientific background and PhD in Physics and Mathematics. I also had a chance to get MBA and it helped me to learn classic models around people management, finance, business environment analysis etc. If someone asks me if I believe that MBA is the key step to be successful manager the answer would be definitely “NOT”. The reason behind that is very simple. It is very useful and beneficial and I do appreciate MBA education. It gives you extremely useful tools and models but it doesn’t guarantee that you will be able to use these tools appropriately. Simple example of that might be a craft of cooking. Every person can read how to cook a cake but someone does it extremely well and others produce terrible things.

My experience of being a manager is about 15 years. I am not saying that I am an expert in that. At the same time I have gone thru some challenges already and have established several teams who are still being very successful. I had a chance to work with very talented managers. They helped me to learn by giving specific examples or advising some non-standard methods. So, at some point of time I realized that taking notes for such cases would be quite beneficial for me. Also I started to keep my own examples where specific models or behavior helped me to resolve issues or address different challenges. Finally I have got a lot of material that I would like to share with my colleagues and counterparts.

For this book I focus only on first-line management experience. So strongly speaking I share examples for first-line manager (FLM) work. The reason behind that is very simple. I think that first-line manager is very critical role within any organization. When we start our career we usually deal with team managers. We rely on their experience and skills to help us to be successful. Very often you start building your vision about the company based on your first team experience. So, for you as an employee the first-line manager is someone who makes your development, your success and your experience of work within organization. For a company it is also very crucial to get on board experienced first-line managers. These people drive small units within big mechanism that we call a company. So FLM plays the key role in sustaining this mechanism in healthy state.

And finally I am not saying I have one unified recipe for complex situations. My intension is to share my own experience and my own ideas that may help you to avoid specific issues or to find alternative solution in challenging environment we all operate.

And finally all thoughts and ideas below are solely my personal opinion based on my personal experience.

2. Why people is so critical asset

Many papers contain standard phrase that is saying: “*people are the most critical asset of the organization*”. Why it is so important. The easiest answer would be because people and only people invent new mechanisms, only people manage tough situations and bring new ideas, only because of new ideas the company or organization becomes successful on the market. If you get talented people on board it gives you huge benefit comparing to others who don't have them. Simple example might be – just recall how many times you go to specific car service because you know someone there who can really repair your car. Try to review your cell phone directory where you keep people who can help as great layers or excellent teachers or perfect coaches. This is all about people and their skills. It is evident that without these people you can't be successful enough or do your business. The same situation is with your team or company. If you have such people you are successful and ready for market changes, you have excellent work environment and you trust and rely on these individuals.

3. First day with a new team

I am staying in front of the team and just about to introduce myself... not an easy task. I used to be in two different situations while working for different organizations.

Scenario #1:

Probably the most challenging for me. I worked with these folks just a week ago and we were peers. Right now I am expected to be their manager. Did you have such situation in your life? You are working as an engineer and your manager comes to you saying: *“I believe you are a great person with good management skills and I am looking for a person to manage the team. Would you be interested in this role?”*

So, you are staying in front of your colleagues and you need to find some words to introduce you as a manager. When I faced such situation first time in my life I had very experienced manager next to me as a coach. He told me the day before introduction:

“Don’t try to apologize because you got that role. If you start doing that you will be in a very poor position. Don’t shine as the team wants to see the person who can resolve tough cases. Don’t speak too much trying to explain how you are going to change the strategy for next 1–2 years. You don’t have the answer for that yet. You will need some time to align your vision with environment etc. Don’t try to create a vision that they should expect positive changes with you as some team members (if not all) don’t think this is the case. But do speak honestly. Be open, and encourage people to give you feedback in upcoming discussions and give them some sense that you know what to do next.”

To be honest with you that was one of the worst meetings I ever had before. I saw my colleagues, some of them my friends and they knew me very well. They knew my character, my capabilities and my skills and they were trying to compare me with an ideal manager they wanted to see. Definitely not all aspect of my behavior and my skills satisfied them. And all these concerns reflected in their eyes.

After years I still have no clear path how to deal with such situation. The simple answer would be: each situation needs to be addressed case by case. How I would do it again if I faced such situation? Perhaps the first meeting I would do as a brief introduction of myself by expressing the willingness to make this team successful. Trying to break the ice. Usually it means for me to make team members to see that I become their advocate in the organization rather than the person who starts punishing them for missed deadlines. Actually you have much more power to manage. You have got amazing benefit in doing that – you know the team very well! You know what kind of problems you have, what you want to change and how you would like to organize the process. The key idea – don’t forget your experience of work as an individual contributor in the team. This part is very critical. I will be talking more about expectations from your team and your manager that may contra verse each other time to time but this part of your heart and your experience should be accessible in your memory.

Scenario #2:

Another common situation is when you are a new to this organization or the team at all. This particular case has both benefit and concern that you have to keep in mind. Let’s start with benefits that I see in this scenario.

First of all you are a new comer for this team which is good and bad simultaneously. You are a stranger and can change their life but nobody knows who you are. You are not friends, you don’t know their gaps and skills, you are not aware of any fault they have had before. It gives you flexibility to start with blank page. That means you can design relationships and your behavior in the way which is comfortable for you. You can position yourself whatever you want, it could be external expert with broad experience or smart manager that has excellent background in different business processes. Anyway you start all these things today, right now.

Concerns? Definitely YES and a lot! Just imagine situation when you get a new manager. You may have as many as possible facts about their great experience or how much they bring amazing

things into your organization... but the first question you have in your mind... how many changes they are going to do? Whatever who is staying in front of you it's all about what kind of changes they have in mind. You never know if they decide to run optimization or review organizational priorities and which projects go away after that. So you worry about your future and your role after all. Now you are in a position to deliver some message in your first meeting with the team. The problem here is that you also understand that you don't know if any changes required into this team and how quick you will have to initiate them. So I would avoid promising that everything should stay unchanged. This is not true! And you can't guarantee that everyone accepts new challenges. I try to be open here. The main word in my vocabulary in this section is BE OPEN with people you are going to manage.

I don't have universal recipe for this situation as I said before but I have two examples from my experience. Both of them were about a situation when I was in the room with my colleagues listening our new manager's introduction.

First speech: *“Team, I have broad experience in managing such team in many other organizations. I see a lot of opportunities in developing your team and building alignment with your key stakeholders and business trends. Business is changing and we have to be aligned with that. It may require tough changes. We will have to adopt to these changes. Even more we will have to change ourselves to make sure we are successful organization. Over the next 2–3 weeks I will spend time by learning different aspects of business around this team and come out with strategic objectives and action plan what we are going to implement as a course of actions for the team”.*

Second speech: *“Team, I see interesting and challenging opportunity for me to work with you and try to be the driver of your success. I don't know you but I'll try to learn and understand your capabilities to make sure I will utilize them in right way. I will need to spend some time by learning who you are and what business challenges we face. I will rely on your help and support here. You know much better than I about processes within this team and I would appreciate if you could help me to understand more. At the same time I will bring skillset that I have got by working in different business environments and I strongly believe it should help us to build great synergy in the team. Next 2–3 weeks I will spend learning from you. I can't say if it requires any changes into the team but I believe we will work together to make sure we manage these challenge in successful way”.*

Tell me, which speech do you like more? In my view first one comes from a person who is more task oriented person. Second one is more about people oriented. Second manager is trying to build some trust or at least give some sense of taking care about people in the team. The funny thing is that when I show these speeches to my colleagues there are some people who like first one and some who like the second speech. Pessimists are saying: *“I don't believe both, this is bull shit anyway!”* And in my opinion this split clearly shows real picture. You will be treated by some team members as promising person, others will strongly believe you are not a good fit and the rest will be saying they don't care. This is the real environment you have to work with. Not a promising expectation...

4. First weeks with a new team

So, finally we have the team that expects you to help them to succeed into organization. At the same time they have no idea what you are going to do next. To address these concerns you need to learn more about each person and overall of the team. Before we start talking about the process I recall one of the best examples that I have seen into my practice that clearly illustrates the gap between what we as managers see vs. what others see.

Exercise:

Let's imagine a situation when you play the role of top manager of the organization. You have a team and you have to deliver tough message to them by saying that because of developing new market you need to move the whole team from one region to another. The process itself is very challenging as you need to deliver it and make sure you have commitment from your team to support this change. This is the first time when you share this news with your team. Try to capture 4–5 key messages that you are going to deliver to your team, i.e. what you are going to address while talking to the team.

Another person plays the role of individual contributor who is impacted by this change. You are more or less aware what is going to be delivered. Try to summarize 4–5 key topics you would like your manager to talk to you during this meeting.

Now we uncover these two lists and compare them. I have seen several examples of this exercise and this is what usually managers start to write down:

1. Business environment overview;
2. Organizational changes and strategy overview for next 2–3 years;
3. New market opportunities and how critical it is to explore them to be successful;
4. New region overview and market demand and how it fits into the company and team's strategy;
5. How team is being impacted.

This is pretty logical, isn't it? Now let's see what people in the team put together (not always for sure but more likely you will see the following list):

1. Who is going to be impacted and how;
2. If there is any relocation package to support these changes;
3. If my family had opportunity to move with me and how;
4. What's the life standards in new region and how they looks like vs. current region;
5. How these changes correlate with long term strategy of the company.

Now take a look at these lists, the problem is that if you compare them you find that managers start with messages that are less relevant to many people into the team. Even more, priorities in the first list completely contradict with team members' expectations. There is no surprise here. Put yourself into the shoes of your team members. What would you ask your manager if they ask you to move to another region? People take care about their life standards, their security etc. This is the fundamental part of their life (just recall classic Maslow hierarchy of needs). At the same time as soon as you become a manager you start shifting your vision by completely ignoring that your team can see your steps in completely different way. It doesn't mean actually that you should change the way of what you are saying. The key point is:

This is not what you want to deliver but rather HOW you deliver it!

“HOW” doesn't mean that you simply rephrase the message but how well you understand team's expectations and utilize them in the right way to get the maximum outcome for the organization. I strongly believe that when you are able to find the right balance between what people want from one side and what they have to do to make them successful into organization the better outcome you get for the organization and you team. This is not an easy task as you need to be aware of many

details and actually keep very close link with team members, i.e. to understand crisp and clear their concerns, their expectations, their desires and what drives your team members.

4.1 Understanding of your team

This is critical part. I believe this stage is even more important than the first meeting with the team. When you first time faces your team members and introduce yourself you have just little time to demonstrate who you are. When you spend time talking to team members you have much more opportunities to show both positive and negative sides of your character and your management style. So, take time to be prepared for this stage.

First of all you need to allocate enough time for meeting with each member of you team. It doesn't mean having 15 minutes chat during the lunch into canteen. Make sure you allocate at least 1 hour with everyone and book a room for this discussion. Put together specific agenda for each meeting and make sure you clearly articulate the purpose of this talk. Capture key items you want to cover. If any item into your agenda requires additional information make sure you have this information in place.

The idea of such meetings should be to understand concerns, individual expectations, and learn as much as possible about team members. You will need to listen to people rather than talk. This is not an easy task but you have to learn.

It's extremely difficult to start this discussion as you have no idea what each individual has in mind and if they have own agenda for this meeting. At the same time you should try to manage the flow. You need to break the ice when you start this conversation. I don't like a situation when you are treated as a boss. In such case you will not be able to learn too much. You team members should feel that you are on their side, they should trust you to share details. Perhaps it is not easy to achieve in the first 2–3 meetings but step by step you should encourage people to do that.

I had many situations when I was not successful in this exercise. Perhaps I should refer to one of my worst experience here:

We started to work together with one of my peers and after some time I was offered a management role in the same team. My colleague had a lot of concerns and he was very open about that. We sat together in a room and I asked him to share feedback about me as a manager as well as to share his thoughts on future of the team. He was very straight forward by saying that he didn't see me as a manager at all. Even more he gave the whole list of reasons why. My first reaction was just awful. I understood that he had opinion that I couldn't change in short term. He was one of the brightest persons I had ever known and one of the best experts in our team that made his voice very powerful. I spent approximately 2 years to change his perception and change myself to be recognized by him as a good manager.

Don't give up! Even in a situation like this. You should always remember that other people may have different experience with different managers. Sometimes the bar is very high and you as a new manager may not fit into someone's perception about good or bad manager. The key point here – continue to listen to those who criticize you. You will find a lot of useful comments. At the beginning of your path as a new manager you will have to change a lot into your approach to work and people.

4.2 How do you behave in the office?

I like my job... I don't remember a day for last 10 years when I don't want to go to work in the morning. I spend a big part of my life here and this team is a part of my world already. I would like to allocate some time to chat about behavior. This is really critical part. Many of us don't think how much it impacts our relationships with the team. Let me share a couple of examples from my personal experience:

Once my work desk was in a separate office space relatively far away from the team. That was calm and quite space and I liked that. After 3 months' time I realized that I missed some link with my team. I spent the same amount of time by having official meetings with the team including staff meetings, 1:1 chats etc. At the same time I missed huge part of informal talks. I decided to move back to sit close to my team.

After that case I didn't try to seat separately any more if possible. The key point here is about being the part of this community. You should understand what is going on in your team, what they are discussing, what they feel about work, tasks, projects etc. Be careful and don't take another extreme when you behave as a spy. You should contribute into their discussions, into their chats and be inherent part of this team.

Ask people how they are! You need to know what's going on with them outside of work hours. This is extremely crucial. Put yourself into their shoes. If you have problems in your family or whatever else how do you find your level of motivation when you come to the office. May be you can abstract your mind from these problems but I have not met such people too much. I clearly understand that sometimes I can't help them but I have to support them and take care of them. I would call this "personal touch". Below you can find a few great (from my point of view) examples of managers who applied such approaches in a very smart way:

1. First example comes from one of the companies where the manager has about 100 people in staff. He allocates about 2 hours twice a week to go around and simply chat with different people in his team. This is not officially scheduled meeting. In most cases he takes some tea and walk around asking people what happens, what they think about latest news etc. Sometimes he shares some jokes or talk about funny stories. He dedicates time to this chats. The bottom line for this example – this manager wants to do that! He doesn't have this in his scope he takes care of people who works for him. And he is interested what is going on around.

2. Second example is about a manager who bought doughnuts and delivered them to each cubical with tea on Friday every week. 1–2 mins chat with many people in the office helps him to keep in touch with the team.

3. The final example is about the manager who invited team members for short walk around the office after lunch just to have informal chat about work.

You don't really need to replicate the same in your team. Probably you will find something unique for your situation. Anyway you should find some options applicable for your case.

I also try to work on that. This is in my agenda. I would avoid doing some special attempts to develop such relationships but having strong believe in that I simply try to follow simple rules:

A. Do not be afraid to show that you are human being. This is much better than artificial management model with clear instructions what others need to do.

What I mean here – you have life outside of work, you have hobbies, you can laugh so you have the whole bunch of feelings. This is normal! When you share with your team members that you like watching comedies or you like dogs you behave naturally. You don't raise the wall between you and your colleagues but rather you build bridges with everyone in the team.

B. Communicate more with people. Encourage them to speak, share feedback, give inputs and proposals, and share their concerns. Make this communication open, honest and make sure you don't

use them for blaming or criticizing others. Make this communication easy to do. It means your team should have an easy way to chat with you when they have topics to discuss.

I still try to avoid any doors between my office and the rest of the team. First time when I found that quite useful was about 15 years ago:

Working into local company I had a team of 10 people and we were based in a small room all together. It was not convenient for us and we finally negotiated a bigger room. We got a lot of space and I had a small private office there. At the same time due to lack of money we didn't have a door there after redesign. But I still felt like I had some privilege to have better office than my team. So after some time I decided to use this room for join meetings rather than a private office. That was right decision because I started to recognize that my colleagues were shine to come without knocking.

I definitely vote for pretty equal conditions when you work together. I am lucky to have experience of working with top managers who sit in the same office space in the same cubical close to you so you feel them engaged into work process.

C. Don't be afraid to admit your faults. Be honest by saying that you made a mistake.

D. Be open and honest. People feel when you lie and when you try to dodge. Otherwise the level of trust will go down immediately.

E. And finally always remember that trust is something that you spend years to establish and can lose it within 1 day.

4.3 Action plan after round of discussions

One of the key problems after round of discussion when the team has no clue what next steps are. Sometimes this is something that managers forget to do. I have seen several examples when different companies conduct annual survey to collect feedback or managers run exercise to collect inputs from the team and do nothing after that to share what next step is. The problem with such approach is always about some humors that starts spreading around. No one understands why they have spent time sharing their thoughts and ideas and it seems to be wasting of time. So when you decide to do that next time you will get much lower response back and few inputs.

So to avoid such negative impact I keep in mind that you need to report out your observations and identify next steps or some action plan to make clear for the team what you are going to do next. Sometime it requires some time to accumulate and build this report. I usually set up clear deadline for me to prepare such presentation and share this deadline with the team before I start collecting feedback. Even if for some reason you need more time to compile report tell honestly about that. Everyone understands that you may need to analyze data a little bit more rather than having no explanation why you promise to share details yesterday and still have no excuse for delay.

Second point is about the style of reporting out. I keep in mind two classical examples of good and bad reports and I want to share them with you:

Example #1:

We had a team where a manager worked hard for about 1 month to get inputs from the team and learn each member of the team. We were pretty open because we believed that he was experienced manager (at least we found him as a good manager). Today we have staff meeting and our manager is going to present material he has prepared for review. Below is his speech (short summary that I am trying to reproduce in my own words):

Team, first of all I would like to say big thanks for your inputs I do appreciate your inputs and honest feedback I have got so far. I design a couple of slides here to summarize key observations I have made. Also I share with you what my next steps are. I also want to share with you the logic behind this action plan to make it clear why we take these steps and what we want to achieve with these plan. I split this action plan into 30 and 60 days and 90 days period to show what actions we are going to take and what type of indicators we are going to use to measure success.

Finally I understand that some actions may generate even more questions. To make sure that everyone can address their concerns we will have time to discuss it today during Questions & Answers session. In addition to that if you have further question or you may want to discuss them off-line I will set up some time with each of you to discuss that. At the same time I do rely on your support here because I believe it is critical to make this team even more successful that it has been. So I would highly appreciate your involvement in tuning this action plan if needed.

The same situation, when a manager spent a lot of time collecting feedback and inputs and again the same staff meeting to reflect some key observations.

Example #2:

Team, I have done tremendous work last 3–4 weeks by collecting feedback and analyzing situation around. I have to say that I have found many gaps here. These gaps will require immediate reaction and tough steps. Some of you will disagree with proposed action plan but unfortunately this is something that we have to accept otherwise we will not be successful. So here it is...

You may tell me: “Common, this is very evident difference”. At the same time both examples are real cases. Despite the fact that they are completely opposite to each other some managers don’t feel the difference between them when they speak in front of the team. The different is crucial: in first example you try to engage the team in this work further and try to involve them in implementation stage. Second example is all about: “Team, I have the perfect idea, you have to accept my decision.

I don't care what you feel about that. If you disagree it's your problem not mine". The difficulty in such approach is about how you are going to implement these changes if your team doesn't support you or don't believe in what you are doing!

Some of you may also tell: *"It is hard to judge what is true, first situation is more about light changes when you don't need to take big changes in the team. Second case is more about tough situation where you understand that without significant modification you won't succeed"*. At the same time I would still argue with you. We speak about the style of delivering the message but not the complexity of current environment. To address some concerns here I recall another example from my own experience when I had extremely tough situation:

Our team was about to accept much more projects without any reasonable investment into people resources. In simple words we had to do much more with the same head count. At the same time we had no chance to change circumstances at that point of time. Now let's imagine a situation when you deliver such action plan to your team by saying: "Folks, you get extra 10 projects to you current work load, sorry team but this is what we have to accept". What do you think they start thinking of you? How much motivation they have after such speech? Perhaps they will even accept this message but do you think you have stable team after that? I would be surprised if you start seeing big support from them.

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