WINTER 2024 • VOLUME 10 • NUMBER 2

# MCE QUARTERLY

AMA/MCE RESEARCH

## Are You the Manager You Think You Are?

See page 4

### OTHER HIGHLIGHTS



www.mce.eu

MCE Management Centre Europe®

# MCE QUARTERLY

JOURNAL OF THE AMERICAN MANAGEMENT ASSOCIATION

WINTER 2024

Volume 10 · Number 2


## AMA/MCE RESEARCH

## Are You the Manager You Think You Are?

AMA/MCE surveyed 1,139 professionals, including 905 managers and 234 staff, and found that managers may not be using management styles as effectively as they think. Page 4

8 Managing Process Employees in a Digital World

14 How to Achieve Goals Through Involving Others

## FEATURES



## DEPARTMENTS

EDITOR'S PICK

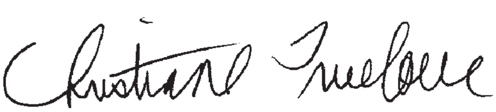
# Recognize Your Style of Management to Succeed

A manager's style can make or break an organization. Think of the best (and worst) bosses you ever had. Ultimately, what was it about them that clicked with you, or made you want to run screaming out the door and never come back? And if you are a manager, does your team do better with you there, or are they surprisingly productive when you are away? To move forward in your career, you may have to answer these questions—and may not like the answers. This issue of *MCE Quarterly* looks at how you can work on your management style.

Achieving self-awareness of your style is the first step. In its most recent survey of executives, AMA/MCE asked respondents to gauge their own management styles, and found that managers may not be using management styles as effectively as they think. Although nearly every manager said they were adept at knowing when to flex their management style, a significant proportion of staff feel mismanaged, suggesting that managers might be overconfident.

In her article, Laura Crawshaw says that tackling the management problems posed by abrasive leaders can reduce attrition and anti-management sentiment, while at the same time retaining the formerly abrasive leader's valuable expertise. Madison Lundquist discusses how managers can ensure that their employees are ready for change and have the skills necessary to be successful with future tools and technologies. And in looking at how to successfully get buy-in from your team on adopting new processes, Renee Fellman says involving the right people at the right time provides optimal outcomes.

If you want to take a deep look at your own management style—and make changes that can positively affect your team, your company, and your career—AMA/MCE has the expertise to set you on the right path.



Christiane Truelove
Guest Editor, *MCE Quarterly*

MCE QUARTERLY

JOURNAL OF THE MANAGEMENT CENTRE EUROPE

GUEST EDITOR
Christiane Truelove

VP, MARKETING COMMUNICATIONS
Lauren McNally

COPY EDITOR
Eileen Davis

ART DIRECTOR
Christopher Blankley

GRAPHIC DESIGNER
John Barberii

PRODUCTION MANAGER
Claire Koby

PUBLISHER
Piera Palazzolo

PRESIDENT & CEO
Manny Avramidis

**MCE Quarterly©** (ISSN 2377-1321) is published quarterly by American Management Association International, 1601 Broadway, New York, NY 10019-7420, SUMMER/Winter 2024, Volume 10, Number 2. POSTMASTER: Send address changes to American Management Association, 600 AMA/MCE Way, Saranac Lake, NY 12983-5534.

American Management Association is a nonprofit educational association chartered by the Board of Regents of the State of New York. *MCE Quarterly* is an independent forum for authoritative views on business and management issues.

**Submissions.** We encourage submissions from prospective authors. For guidelines, write to The Guest Editor, *MCE Quarterly*, 1601 Broadway, New York, NY 10019-7420 or email editor@amanet.org. Unsolicited manuscripts will be returned only if accompanied by a self-addressed, stamped envelope.

Letters are encouraged. Mail: Letters, *MCE Quarterly*, 1601 Broadway, New York, NY 10019-7420; email: editor@amanet.org. *MCE Quarterly* reserves the right to excerpt and edit letters. Names and addresses must accompany all submissions.

**Subscriptions.** Executive and Individual Members of American Management Association receive *MCE Quarterly* as part of their annual dues, a nonrefundable $50 of which is allocated for the subscription to *MCE Quarterly*. Single copies are available at $25 plus shipping and handling. Requests should be sent to sgoldman@amanet.org



Editorial Offices
1601 Broadway, New York, NY 10019-7420
Tel: 212.903.8075; Fax: 212.903.7948
Email: amaquarterly@amanet.org

# Just How Much Do Management Styles Matter?

According to the author Jonathan Swift, "The proper words in the proper places are the true definition of style." When he wrote this in 1720, he was referring to how someone conducts themselves, but it could easily be applied to today's idea of management styles.

Good management is always key to an organization's success—but how often do managers use the most appropriate style to get desired results from their people? Do the proper words in the proper places matter when there are other measures of accountability, such as deadlines and performance reviews?

AMA/MCE recently surveyed over 1,100 U.S. knowledge workers to get a better understanding of the role management styles play in performance and business success. We presented four commonly recognized management styles—democratic, autocratic, laissez-faire, and facilitative—and asked participants about their particular experiences with these styles.

The results revealed alarming differences between how managers saw their own styles and how their employees perceive them. For example, 55% of managers said they use a democratic style, but only a third of direct reports said they were managed in this way.

Also, more than 90% of managers who responded indicated that they flex between different styles, but only 60% of employees said their manager had the ability to do this.

So how much do these disparities matter? Our research also suggests that knowing and using the right style at the right time can increase the likelihood that managers will get the best possible results from their people. Improvement in results is always achieved when managers and employees are on the same page.

Of course, the manager also has to be well equipped with other key skills such as good communication, emotional intelligence, the ability to delegate and motivate effectively and to assess and redirect performance, and so on. Still, recognizing when and how to apply the most appropriate management style helps ensure you're getting the full impact of all of these other management skills.

The most successful managers use any trusted tool at their disposal to get optimal results—so knowing and flexing your own management style is clearly worth careful consideration.

Manny Avramidis
President & Chief Executive Officer
American Management Association

AMA/MCE RESEARCH

# Are You the Manager You Think You Are?

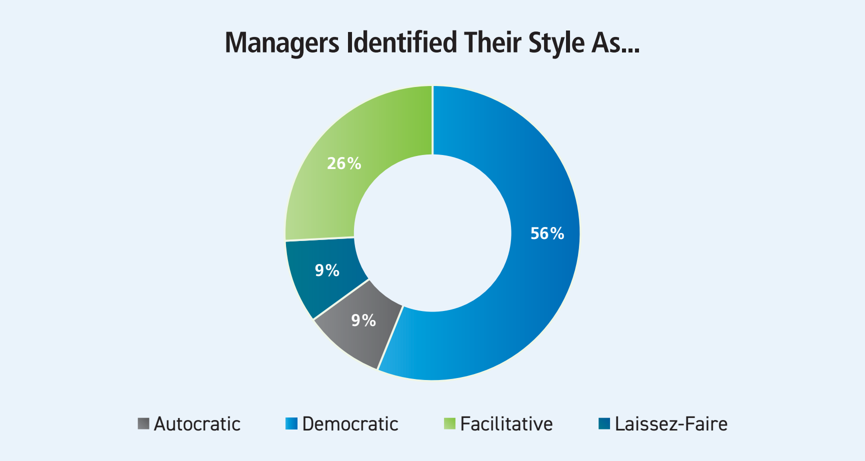
BY AMA/MCE STAFF

IF you're a manager, you've spent time thinking about your management style. Would you categorize your predominant style as autocratic, democratic, laissez-faire, or facilitative? And do you really have a strong sense of what these styles are, and when it's appropriate to use them?

In addition to your predominant approach, do you have a versatile palette of styles? Are you able to sense when to use each one and shift between them as needed? How does your use of styles compare with other managers? Do women use styles differently from men? How do styles shift at different management levels?

Perhaps more importantly, what do you know about how your staff perceives your style? Do they concur with your understanding and use of styles? Do they think the style in which you manage is appropriate and effective? Or do they feel mismanaged?

To explore these and related questions, AMA/MCE surveyed 1,139 professionals, including 905 managers and 234 staff, in the spring of 2024. AMA/MCE's experts found that managers may not be using management styles as effectively as they think.




## THE FOUR MAJOR MANAGEMENT STYLES

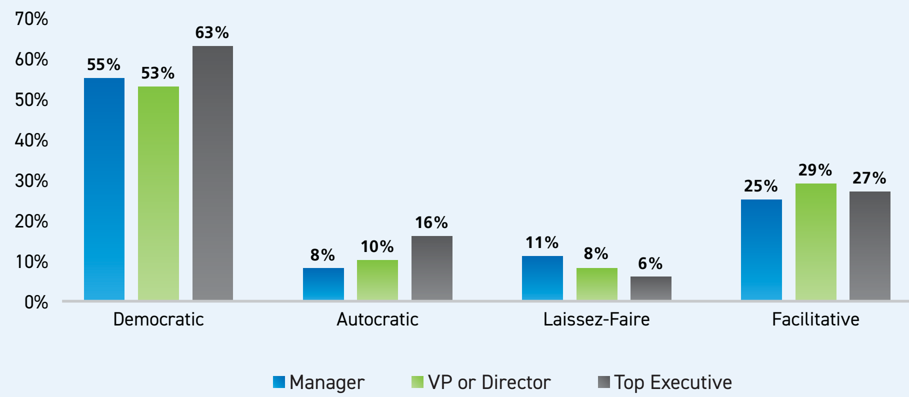
"More than 80 years ago, Kurt Lewin, the father of social psychology, identified three major management styles—authoritarian, democratic, and laissez-faire," according to AMA/MCE faculty member Joseph Reed, PhD, an expert in organizational effectiveness with over 30 years' experience providing training and other services to corporations and institutions. "More recently, researchers have added a fourth: facilitative, and 'autocratic' has become common, often replacing 'authoritarian.'"

Reed says these styles determine how a manager communicates, decides, and exercises power, and have a significant impact on the work that gets done, how it gets done, and what it feels like to be on that manager's team.

He maintains that there is no single best style. "Rather, managers must shift between them depending on the goal, context, and the team's qualities," he says.

With autocratic or authoritarian leaders, the manager does most of the talking. "They decide what to do and how to do it, and they provide explicit instructions to the staff," Reed says.

## Top Executives Were More Likely to Identify as Democratic or Autocratic




"Despite the name, the autocratic style is not necessarily unpleasant or unfriendly. It is efficient and useful when the manager is an expert and the team members don't have much experience or expertise. In the wrong context, however, it may be perceived as micromanagement, which can demoralize and demotivate. If the team already knows what to do, an autocratic approach can waste the time of both the manager and the staff."

In a democratic style of management, participation in discussions about goals and methods for achieving them is split roughly equally between the manager and the staff, although the ultimate authority resides with the manager. "The team must have adequate skills to make the collaboration fruitful," Reed says. "The democratic style can generate a feeling of inclusion, leading to greater trust and relationships between the manager and team. On the downside, this type of collaboration takes more time, so it may not be appropriate in a crisis or under extreme pressure."

With the laissez-faire management style, the French term translates roughly as "hands off" or "let (them) do as they choose." Reed says the locus of control is with the staff. "There's a minimum of discussion. In its purest form, the manager allows team members to pursue the goals and use the means they choose. Alternatively, managers set goals and the staff decide how to achieve them. Laissez-faire management is appropriate when people are experienced, knowledgeable, and motivated."

He adds that there are some serious drawbacks to this style. "Strategies may be misaligned or may not be executed successfully. The staff may do the wrong thing perfectly, expending energy and resources without contributing to the organization's goals. Additionally, if the team lacks the requisite background or skills, they may feel lost or directionless, damaging the relationship between the manager and staff."

In the facilitative style, the manager actively participates in a dialogue with the team member to define the goal.

"They think through the best way to achieve the goal, but the locus of control rests with the team member, who generally dominates the discussion 70% to 30%," Reed says. "The facilitative style is useful for staff who have some relevant skill and experience, but lack motivation or confidence in their ability to accomplish the goal. It takes more time than the laissez-faire approach, but it keeps the staff on target, helps reduce self-doubt, and prepares them emotionally to take on the assignment."

### AMA/MCE'S FINDINGS ON MANAGEMENT STYLES

According to AMA/MCE experts, in this most recent survey, management style is top of mind for employees of all levels. "The overwhelming majority of respondents agreed that it's important," experts say. "Yet there were stark differences between managers and staff on how, and how effectively, managers were deploying style."

The survey identified respondents as either managers (anyone who manages others) or staff (team members, individual contributors, and others who don't manage people). Managers were asked to self-identify their predominant style. Most said they were democratic (56%), followed by facilitative (26%), laissez-faire (9%) and autocratic (9%).

Women were significantly more likely than men to identify their style as democratic (63% vs. 51%), while men tilted more toward facilitative, laissez-faire, and autocratic styles.

"Top female executives' predilection for democratic leadership is intriguing, particularly given that only 56% of male top executives share this style," AMA/MCE experts stated. "It could be that women with this style are more likely to rise to the top, or women adapt this collaborative approach as they rise, or both. Generally speaking, this is consistent with numerous studies finding that women possess superior social-emotional skills, which are needed to effectively manage in a democratic style. Whatever the explanation, this finding supports the need for a greater number of top female leaders, particularly given team members' preference for being managed

"This may suggest that a large fraction of supervisors are perceived to be less engaged than they think, or that staff may lack adequate direction or oversight."

in a democratic style."

When it came to their managers'styles, employees expressed a different view. "Our study suggests that the style that managers think they are using is often not the way team members believe they are being managed," AMA/MCE experts say. "When we compared all the responses of staff and managers, we found an enormous gap between the proportion of managers who believe they are democratic (56%) and staff who perceive their managers as such (33%)."

Additionally, just over half of staff respondents indicated that they were managed in the style that they preferred, leaving a large proportion dissatisfied with their manager's style.

Nearly 1 in 5 staff (17%) said their managers were autocratic, although no respondents indicated a preference for that style. While more than 90% of managers said they flex between styles and that doing so is essential, only 3 in 5 staff (60%) said their manager had this ability.

The survey revealed an even greater discrepancy between staff members who said they operate under a laissez-faire style (23%) and managers who identified that as their predominant approach (9%).

"This may suggest that a large fraction of supervisors are perceived to be less engaged than they think, or that staff may lack adequate direction or oversight," AMA/MCE experts say.

Although nearly every manager (94%) said they were adept at knowing when to flex their management style, a significant proportion of staff feel mismanaged, suggesting that managers might be overconfident and could benefit from improving their ability to deploy a range of styles and match them with the appropriate business context.

"Being able to flex between styles is a critical skill for managers," AMA/MCE experts state. "Team members and tasks vary greatly. There is no single management approach that works for every employee, in every situation. Effective managers are nimble and responsive. They have the strategic foresight and emotional intelligence needed to understand when to pivot, and the versatility to nearly unanimous (98%) in saying that management and leadership training adapt to a wide variety of employees, projects, and situations."

While staff respondents wereis important, AMA/MCE found that more men (71%) than women (64%) received formal training before becoming a supervisor. "This signals not only room for improvement for management and leadership training, but also that not all managers and leaders are prepared and set up for success when moving into these important roles," AMA/MCE experts say.

A third of managers (34%) indicated that they could benefit from improving their ability to read others and recognize their strengths and weaknesses in order to help them achieve their goals. And about two-fifths (40%) of staff respondents were not convinced that their manager was able to flex their style to provide team members with what they needed for success.

Training could go a long way toward addressing these deficiencies and improving efficiency, productivity, and well-being. For additional resources on management styles and training, visit www..mce.eu.

*Adapted from "Management Styles: Are You the Manager You Think You Are?" To see the full report, go to amanet.org.*

# Managing Process Employees in a Digital World

BY MADISON LUNDQUIST

Nearly every organization (96%) that participated in APQC's "Digital and Its Role in Process: Survey Report" noted they have some sort of investment planned for digital in the next 18 months. Looking specifically at artificial intelligence, only 9% of organizations have made a substantial or full-scale investment today; however, 79% of organizations plan to see an increase in the next 12 to 18 months.

So, what does that mean for managers?

It means that managers may have more money to spend, but they need to ensure their investment is well spent—on the *people*.

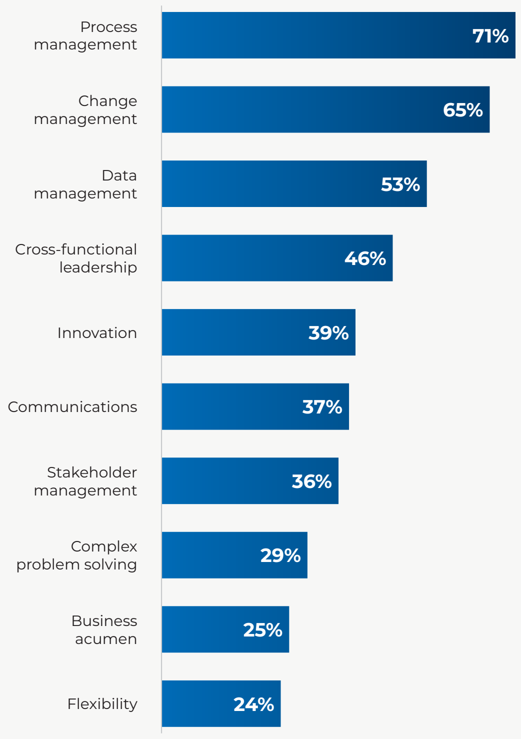
Digital tools and technology are not new in the world of process and performance management, but there are constantly evolving developments and new ways that organizations can leverage these digital tools. Managers need to ensure their employees are ready for change and have the skills necessary to be successful with future tools and technologies.

## IDENTIFYING THE TRENDS

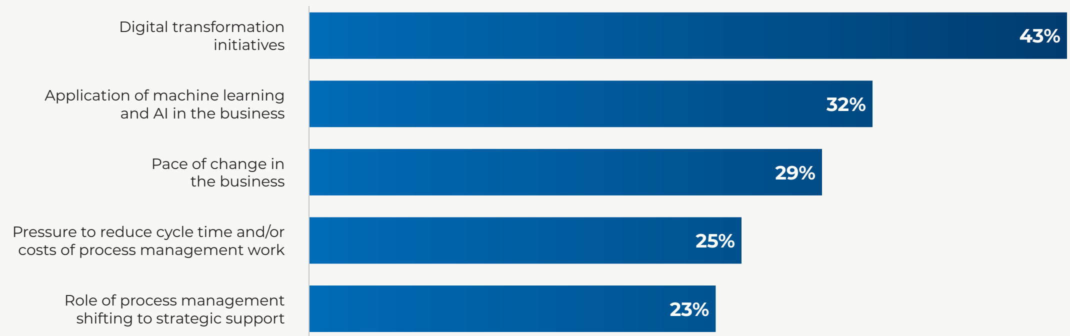
Through our research on digital tools and technologies, APQC discovered that organizations plan to invest time and money in data management (65% of organizations) and advanced analytics (52%) as their top digital priorities, followed by artificial intelligence/cognitive computing (47%) and intelligent automation (41%). Additionally, respondents noted that the top critical skills for success with digital tools and technology are process management (71% of organizations), change management (65%), data management (53%), and cross-functional leadership (46%).

Separate from our survey on digital, in our priorities survey,

**Skills Critical to Success for Using Digital Tools and Technologies**



## Top Five Trends Drivers of Change in Process Management Discipline




participants noted that two of the top skill sets process professionals need to develop in the next 18 months are change management (46% of organizations) and analytics (45%). This group of skill sets from both the priorities and digital research ties closely to the implementation and use of digital tools and technology. Here's how APQC suggests organizations prepare their employees for success.

## PREPARING EMPLOYEES FOR CHANGE

The second-highest priority skill that organizations ranked as necessary to be successful with digital tools and technologies is change management. In our priorities survey, the pace of change in the business was noted as the number three driver for change in the process management discipline and has consistently shown up as a top driver year after year. Change is hard, but since change is something that will continue to exist, it is up to organizations to learn how to change effectively.

## DRIVERS OF EFFECTIVE CHANGE MANAGEMENT

At its core, change management is the act of proactively managing change and minimizing the resistance to organizational change through a set of structured processes or set of approaches to transition employees, teams, or an entire organization to a desired future state. APQC research found six key factors that drive effective change for organizations.

### 1 STRUCTURE AND RESOURCES

**The resources (budget, staff, etc.), methodologies, and assessment approaches that support change management.**

Thirty-eight percent of organizations have a centralized change management function. However, according to our research, the type of structure doesn't matter when it comes to overall effectiveness, but having "some" type of formal structure does increase the effectiveness of change management.

### 2 ROLE OF LEADERSHIP

**The roles and responsibilities involved in guiding employees through change.**

There are three key elements of leading teams through change. First, managers need to lead by example. When leaders participate in and model the change, organizations see more buy-in from staff and more deeply embedded behaviors. Second, middle managers must use coaching and mentoring to encourage staff to implement new practices and fully learn about the change. Third, by monitoring for sustained change, leaders can help ensure the desired behaviors are sticking, driving even resistant employees to adopt the new methods.

### 3 COMMUNICATIONS

**The approaches and tools used to explain the change to staff, collect and incorporate feedback, set expectations, and cultivate buy-in.**

The approaches and tools used to explain the change to staff, collect and incorporate feedback, set expectations, and cultivate buy-in. When looking at how organizations communicate, most rely on push methods like emails or department meetings. It's important to remember that different people learn, hear, and process information in different ways. Thirty-seven percent of organizations surveyed report using peer-led communications, which are a significant factor in driving more effective change management.

### 4 TRAINING

**The coordinated activities used to impart information, change behaviors, improve performance, and help employees attain knowledge or skills.**

Employees can be trained in a variety of ways—on-the-job training, one-on-one coaching, and self-paced videos, just to name a few.

## 5 ENGAGEMENT

### The emotional connection an employee feels toward their organization, as well as the tactics and approaches it uses to cultivate and assess the connection.

It's important to consider when you engage employees throughout the change process. Early and often is key. Various tactics are used to engage employees, but based on our research, among the top are training on how to change, using targeted communications, and providing opportunities for feedback.

## 6 REWARDS AND RECOGNITION

### The formal and informal incentives that encourage specific behaviors or performance.

Keep in mind that much like communications, different people respond to different incentives, so it is important to incorporate a range of monetary and nonmonetary forms of reward and recognition.

## CREATING A STRONG DATA AND ANALYTICS FOUNDATION

According to APQC, data management is defined as the administrative processes of acquiring, validating, storing, protecting, and processing required data to ensure the accessibility, reliability, and timeliness of the data for users.

When organizations have strong data management in conjunction with strong data governance and well-established process management, they can obtain better analytics as well. Here are a few key considerations from APQC on the importance of data governance and effective analytics programs.

## UNDERSTANDING THE IMPORTANCE OF DATA GOVERNANCE

Data governance involves all activities aimed at ensuring data security, privacy, accuracy, availability, and usability. It includes the standards, policies, actions, processes, and technology that support organizations throughout the data lifecycle. Effective data governance protects against data inconsistencies and misuse. Due to the increasing use of data analytics in management and heightened awareness of data privacy concerns, data governance has become a critical consideration.

Through effective data governance, organizations can:

- Improve the accessibility, consistency, and trustworthiness of their data for analysis, measurement, and reporting
- Break down silos across teams and technologies
- Enhance process alignment for management, decision making, and improvement
- Lower data management costs

In process management, ownership ensures accountability and integrity; however, datasets often touch multiple business processes and functions without obvious owners. APQC recommends that organizations instill data owners with the mission of protecting the integrity of data assets, similar to how end-to-end process owners accept responsibility and accountability for the total process. Just as global process owners may not directly oversee each piece of the process, data owners are able to uphold data integrity with oversight of various data repositories that make up the organization's overall dataset, ensuring accurate intake, analysis, and use of the datasets.

## HOW TO ENABLE EFFECTIVE ANALYTICS PROGRAMS

Effectiveness is a key measure of how an organization perceives the impact of an analytics team's efforts and how the team engages the business to shift toward a data-driven culture. However, proving the value of the analytics team's efforts is easier said than done. Here are five key levers that analytics teams can pull to improve their effectiveness:

**Resources.** Resources are foundational. Organizations need to ensure they have dedicated staff and the necessary, high-quality data.

**Selection criteria.** Selection criteria provide context. The criteria allow analytics teams and their stakeholders to understand the feasibility of the analytics project, the resources that are needed, the estimated timelines, and the potential value of the project.

**Measures.** Measures create clarity for analytics projects. Organizations rely on a wide array of measures, using a mix of behavioral, performance, and business results to track and manage their analytics teams.

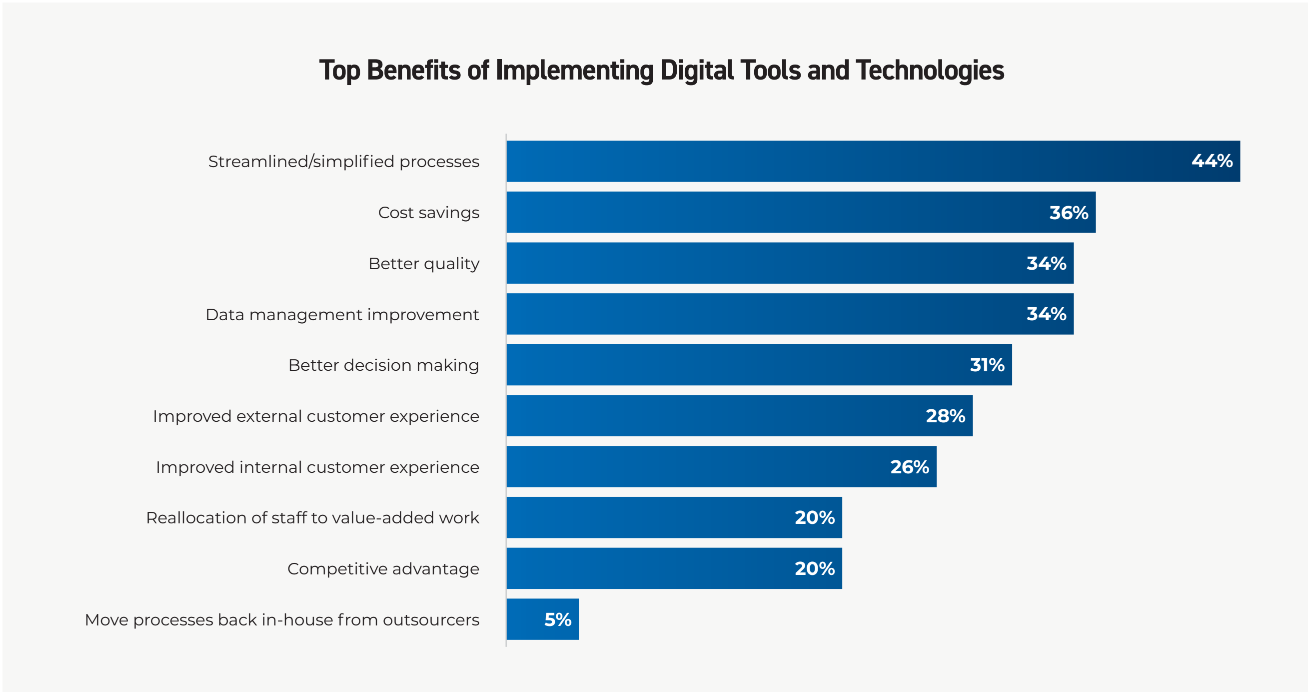
**Engagement drivers.** Engagement practices drive positive perceptions. The top five drivers of effectiveness include defined value, formal analytics team, executive-level support, success stories, and data visualization capabilities.

**Culture.** Culture matters. Establishing a data-driven culture is an ongoing struggle for many organizations. Data-driven organizations base their decisions on well-researched, empirical evidence. In short, being data-driven means using good data to make objective decisions. Remember to utilize the key drivers of effective change management mentioned above.

## BENEFITS AND CHALLENGES OF DIGITAL TOOLS AND TECHNOLOGIES

When looking at the benefits organizations realize when implementing tools and technology, they include:

- Streamlined/simplified processes
- Cost savings
- Better quality work
- Data management improvements




- Better decision making
- Improved external and internal customer experience

While there are great benefits to implementing digital tools and technologies, organizations still struggle with:

- The cost of implementation
- Processes not documented and/or streamlined
- Competition with other changes
- Lack of guiding strategy
- Lack of skills to use new systems and processes
- Security and governance concerns

When processes aren't documented, it creates a roadblock to implementation for a variety of reasons. Organizations could implement a tool or technology that affects a process unknowingly, creating a domino effect of issues. Or it could slow down the implementation because the team implementing the new tool may require the process to be documented prior to implementation.

Another challenge organizations face is the competition with other changes (risking change fatigue or change saturation). It's important to have a team within the organization that prioritizes the changes and ensures proper change management methods are used enterprise-wide.

As managers prepare their employees for digital tools and technology, it's important to remember these steps:

**Prepare your staff.** Implementing a new tool or technology is a change. Organizations need to learn how to effectively manage that change by implementing APQC's key drivers of effective change management—structure and resources, role of leadership, communications, engagement, training, and rewards and recognition.

**Create a strong data and analytics foundation.** Effective data governance protects against data inconsistencies and misuse. Instill data owners with a mission to protect the integrity of data assets.

**Establish policies for the organization.** Consider issues such as how internal, external, and client data should be handled, and whether employees should or should not be using AI for tasks, for example.

**Prepare your process documentation.** Ensure you have well-defined and streamlined processes and good data management practices.

New digital tools and technologies provide a world of possibilities for organizations to streamline their workflow and increase efficiency, but only if there is a strong process foundation already in place and managers guide their employees through the implementation with thoughtfulness and precision. AQ

*Madison Lundquist is principal research lead at APQC, developing and executing the organization's research agenda for process and performance management and serving as subject matter expert. She interviews organizations on their practices, identifies key findings, and shares the approaches and best practices organizations use to manage process, improve organizational agility, and continuously improve.*

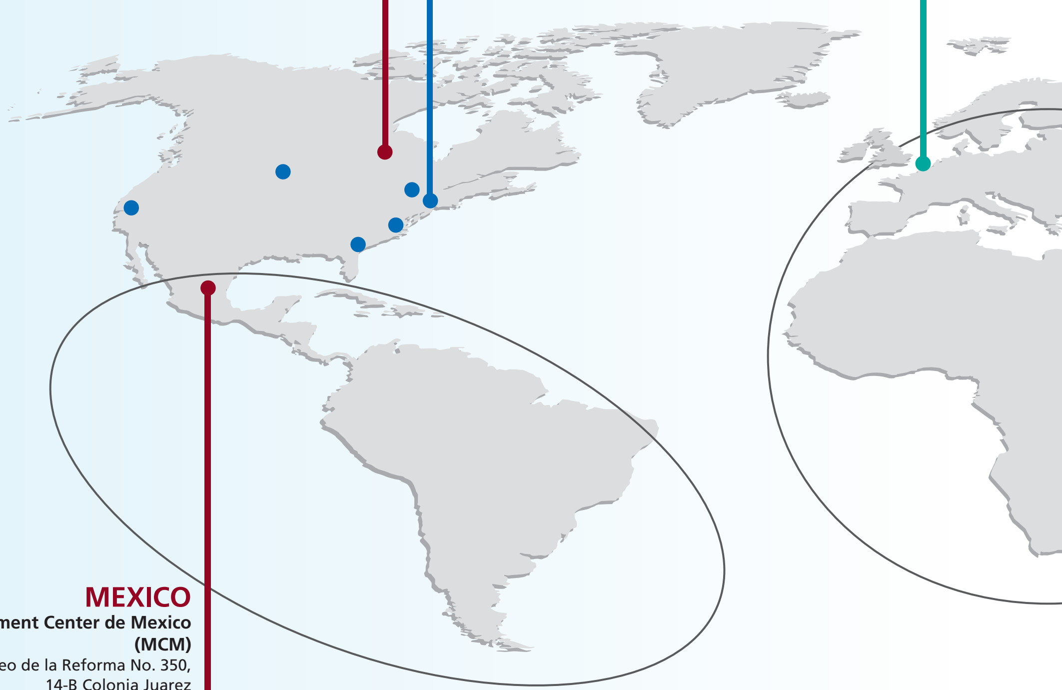
# MCE is part of AMA Global

## Delivering learning and development solutions around the world

**CANADA**
**Canadian Management Centre (CMC)**
150 King Street West, Suite 271
Toronto, ON, M5H 1J9
Canada

**UNITED STATES**
**American Management Association (AMA Headquarters)**
1601 Broadway
New York, NY 10019, USA

**EMEA**
**Management Centre Europe (MCE)**
Glaverbel Building
Chaussée de la Hulpe 166
b7 Terhulpsesteenweg
1170 Brussels, Belgium



**MEXICO**
**Management Center de Mexico (MCM)**
Paseo de la Reforma No. 350,
14-B Colonia Juarez
06600 Mexico, D.F.


**UNITED STATES**
**Manos Avramidis**
President & Chief Executive Officer
+1 212 586 8100
info@amanet.org
www.amanet.org

**MEXICO**
**Jorge Perez-Rubio**
+52 55 3098 3300
info@amamex.org.mx
www.amamex.org.mx

**CANADA**
**Geoff Blackwell**
+1 416 214 5678
cmcinfo@cmcoutperform.com
www.cmcoutperform.com

**EMEA**
**Patrick Faniel**
+32 2 543 2120
info@mce.eu
mce.eu

**SAUDI ARABIA**
**Osama Dukhan**
+32 475 72 9886
odukhan@mce-ama.com
mce.eu

**INDIA**
**Anand Dewan**
Licensee
+91 1800 102 1345
anand.dewan@amasouthasia.org
amasouthasia.org

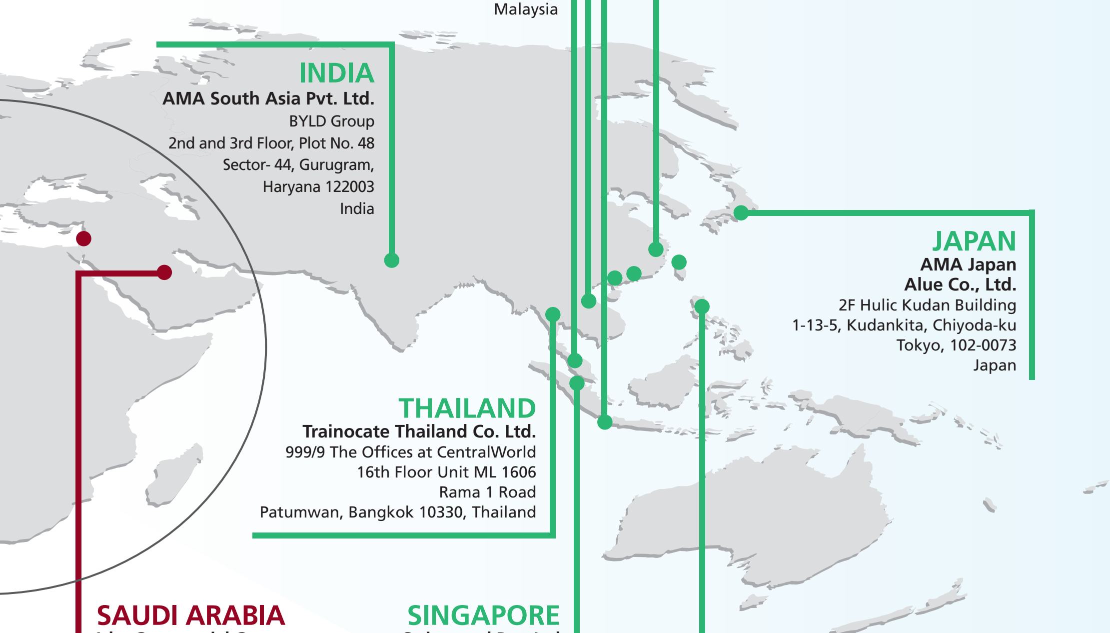
**THAILAND**
**Jaruwan Laptrakool**
Licensee
+66 2 613 1033
thailand@trainocate.com
trainocate.com

AMA GLOBAL

American Management Association

AMA Asia/Asia-Pacific · AMA Latin America · AMA USA · CMC Canada · MCE EMEA

*Atlanta · Arlington · Bangkok · Beijing · Brussels · Chicago · Guangzhou · Ho Chi Minh City · Jakarta · Kuala Lumpur · Manila*
*Mexico City · New York · Riyadh · San Francisco · Shanghai · Shenzhen · Singapore · Taipei · Tokyo · Toronto*



## VIETNAM
**PACE Institute of Management**
PACE Building
341 Nguyen Trai Street
District 1
Ho Chi Minh City
Vietnam

## INDONESIA
**PT Trainocate Indonesia**
Treasury Tower Fl. 11 Unit G
District 8 - Lot 28 SCBD
Jl. Jenderal Sudirman Kav 52-53
Kel. Senayan - Kec. Kebayoran Baru
Jakarta Selatan - DKI Jakarta 12190

## MALAYSIA
**Quintegral Sdn Bhd**
Unit 10.02, Level 10, Mercu 2
No. 3 Jalan Bangsar
KL ECO City, 59200
Kuala Lumpur
Malaysia

## CHINA
**AMA China Head Office**
Room 306, Block G, Vanke Center,
No. 9335 Humin Road,
Xuhui District, Shanghai

## INDIA
**AMA South Asia Pvt. Ltd.**
BYLD Group
2nd and 3rd Floor, Plot No. 48
Sector- 44, Gurugram,
Haryana 122003
India

## JAPAN
**AMA Japan**
**Alue Co., Ltd.**
2F Hulic Kudan Building
1-13-5, Kudankita, Chiyoda-ku
Tokyo, 102-0073
Japan

## THAILAND
**Trainocate Thailand Co. Ltd.**
999/9 The Offices at CentralWorld
16th Floor Unit ML 1606
Rama 1 Road
Patumwan, Bangkok 10330, Thailand

## SAUDI ARABIA
**Isha Commercial Center**
6299 Alisha Street Office 14 and 15
Second Floor, 12815 3190
Riyadh, Saudi Arabia

## SINGAPORE
**Quintegral Pte. Ltd**
8 Cross Street
Level 28, Manulife Tower
Singapore 048424

## PHILIPPINES
**Quintegral Philippines, Inc.**
19/F Philippine AXA Life Centre
Sen. Gil Puyat Ave.
Makati City, Metro Manila
Philippines

### MALAYSIA
**Sharifah Rafidah**
Licensee
+60 36205 4818
solution@imperialconsulting.com
imperialconsulting.com

### SINGAPORE
**Alfred Chan**
Licensee
+65 6332 2330
solution@quintegral.com
quintegral.com

### VIETNAM
**Binh Nguyen**
Licensee
+84 28 3837 0208
ama@PACE.edu.vn
www.PACE.edu.vn
www.AMAVietnam.vn

### INDONESIA
**Ronny Kurniawan**
Licensee
+62 21 295 33 333
indonesia@trainocate.com
trainocate.com

### CHINA
**Peter Kao**
Licensee
+86 21 6473 7161
marketing@amachina.com
www.amachina.com

### PHILIPPINES
**Kristine Santayana**
Licensee
+632 845 1324
solution@quintegral.com
quintegral.com

### JAPAN
**Bunshiro Ochiai**
Licensee
+03 6268 9791
ochiai@alue.co.jp
alue.co.jp

# HOW TO ACHIEVE GOALS Through Involving Others

BY RENEE FELLMAN

Whether a company's goal is to increase sales, decrease costs, improve efficiency, launch a new product or service, solve a particular problem, or select, implement, or improve a system, involving key personnel in planning and implementation can dramatically enhance the likelihood of achieving the best possible outcome.

There is a frequently used saying that "a camel is a horse designed by a committee." To achieve the goals listed above, managers must avoid the potential pitfalls of what is essentially a committee process. To that end, what attributes must the manager leading the process possess? What are the necessary steps to take? Finally, why does involving others provide the optimal results?

## ESSENTIAL MANAGEMENT ATTRIBUTES

The manager-leader must genuinely desire input, communicate that desire effectively, include the right people, establish appropriate boundaries, and convene only necessary, appropriate, productive meetings.

Managers who lead the process must truly believe that they are not omniscient, they do not have every skill, sometimes they may actually be wrong, and sometimes other people really do have better skills and ideas. Otherwise, participants will feel like their ideas do not matter and mistrust the request for input. That mistrust, and a fear of rejection, may make participants refrain from joining in wholeheartedly and suggesting valuable ideas.

Managers must ask themselves, "What skills, knowledge, and personality attributes in addition to mine are essential to explore possibilities productively and define a practical, actionable plan?" Without this question, they may fail to open the planning process to people who have those important characteristics. In addition, unless managers include people from all affected departments, the plans created may be unrealistic, unachievable, and ineffective.

Ideally, although a business should not be a dictatorship, for a variety of reasons it also cannot be a democracy in which everyone gets to vote and the majority prevails. The leader needs to articulate clearly any boundaries or limitations that exist and have the courage to sometimes say "no."

## GETTING INPUT FROM THE RIGHT PEOPLE

Companies need good, competent people not only because their employees must have the right skills but also because these people want to work with other good people. The leader must accurately identify the skills and expertise required because the better the people participating in the planning process, the better the outcome will be.

Depending on the company, the issue, and the process, it may be helpful to obtain input as events unfold—through digital surveys, small group meetings, or individual conversations—from stakeholders across the company who might have valuable knowledge, opinions, and ideas. Surprising information and remarkable ideas often pop up.

## DEFINING THE PROCESS

To achieve business goals, managers should follow these steps. First, describe the challenge in broad strokes—for example, "Our goal is to increase the profitability of the company, business unit, product line, or department."

Second, break the topic into pieces and seek input from participants about which pieces are most promising. For those pieces, list possible actions, decide which ones should have highest priority, compile data needed for decision making, and develop specific plans for each of those priorities.

Third, once the plan has been clearly defined, describe in writing the underlying assumptions used and prepare a chart that identifies key tasks to be done, by what dates, by which people, and the expected financial outcome for each action.

Fourth, based on the above, prepare detailed financial projections that clearly identify and incorporate both the assumptions used and the task lists. These projections can then be used to prepare sensitivity analyses that reflect the impacts if base assumptions are not realized. To illustrate, "If we can go to market by this date, our bottom line will be $X; if by a later date, it will be $Y. If we sell 20% less or 20% more than our base assumption, the resulting bottom lines will be $X or $Y. If our material or transportation costs increase by a particular percent, the bottom line will be $Z," etc.

Finally, after reviewing the sensitivity analyses, decide upon and publish in one document the plan, task list, and projections the group believes to be most reliable.

The following is a simplified description of how the process might proceed.

## SELECTING THE PATH

In this hypothetical example, the entity is a manufacturing company that sells products to consumers both online and in retail stores, and its goal is to boost profitability in the near term. The two primary paths to increasing profitability are increasing revenue and decreasing costs.

Because this business is already operating in a highly cost-effective manner, management has decided that finding ways to increase revenue is the path to explore in depth. The leader

convenes the team and solicits ideas from attendees about the best way to accomplish that expeditiously.

The conversation might sound like this:

Leader: "What opportunities do we have to increase revenue?" Responses might include: "Sell more of Product A, B, or C," "Modify Product A to make it more attractive to customers," "Raise prices or decrease prices," "Secure shelf space in additional retail entities," "Make it easier to buy products through the website," or "Have specials on old or slow-moving inventory."

Next, the group explores which of the suggestions is likely to provide the greatest return. Choosing the best option or combination of options requires them to examine what is needed and consider internal and external factors. If marketing says, "We can sell this much more of Product A," production might say, "I wish we could produce that quantity, but we simply do not have the capacity. We could, however, produce at least this much more of Product B. Can you sell that?"

If marketing says, "Yes, we can do that," and the team concurs with the leader that selling more of Product B is the most promising strategy, the next step is for the team to list the critical components needed to develop and implement detailed plans, identify who will be responsible for collecting and producing each piece of information, and specify dates when those pieces will be available. The team must decide what assets will be needed, what needs to be done when and by whom, and what the attendant costs are.

At this point, subgroups, each with a clearly identified leader, are formed to gather information and recommend action plans to the group as a whole on a designated date or dates. Leaders and participants in these subcommittees may choose to solicit input from those who report to them.

On the marketing front, there are multiple facets to consider and decisions to make. To establish a realistic sales target, marketing needs to quantify the extent of realistic customer demand. Is demand seasonal? Should prices be increased, decreased, or maintained as is? What steps need to be taken to increase both in-store and online revenues? What actions does marketing need to complete and by what dates to ensure the proposed target is reached?

Other departments have equally compelling considerations, such as how much lead time production and logistics need, when product needs to be ready to ship, and whether procurement can definitely obtain parts and supplies at necessary times and with locked-in pricing. Other factors to consider are the activity timetable and the cost to execute those plans.

To maximize the likelihood of arriving at the best possible plan as facts are gathered and ideas are generated, each team must consider the most cost-effective way of performing each task and reduce friction at every level of the process. All teams and sub-teams need to ask themselves, "Are we making it as easy as possible for customers to decide to buy our products, and have we created processes that will make it as easy as possible for our vendors and our own personnel to fulfill their responsibilities successfully?"

Although every issue has a financial impact and the finance department's input needs to be carefully solicited and considered throughout the process, participants must thoughtfully weigh the possible effects of any financial observations and recommendations.

## DEFINING, DOCUMENTING, AND ADOPTING THE PLAN

The next step, based on the information obtained, analyses performed, and decisions made, is to define specific targets and timetables for all aspects of the plan. During this stage, targets are set for sales, production, and costs, and tasks are identified and memorialized in an exhibit that clearly shows which manager is responsible for completing which task by what specific date.

At this point, finance has the information needed to prepare detailed financial projections that include a verbal description of the plan's underlying assumptions and the numbers that are expected to result from the clearly established timeline and tasks.

Before final plan adoption, managers need to run sensitivity analyses on the projection model and make those analyses available to the planning team to help them assess the ramifications if scenarios do not play out as anticipated.

Involving the right people at the right time provides optimal outcomes for three reasons.

First, the plans that emerge from this process tend to be remarkably realistic because key managers have been intimately involved in their creation. Participating management team members have heard about the processes, opportunities, challenges, and constraints of functional areas other than their own and have considered the impacts of various actions on all facets of the organization.

Second, the process establishes accountability because there is literally an exhibit that shows who is responsible for completing which task by what date, and there are financial projections that specify the expected financial and operational outcomes. In addition, peer pressure is in play. All managers have made commitments, in the presence of their peers, to complete particular actions with particular results.

Last, but definitely not least, managers have participated in plan creation. It is not a plan with targets created by and foisted upon them by the CEO or CFO. It is *their* plan, so they are fully invested in and committed to reaching and exceeding their goals. AQ

*Renee Fellman has served as interim CEO for 20 companies and as an outside consultant to 21.*

# Managing Abrasive Leaders with Backbone

BY LAURA CRAWSHAW

**Abrasive leaders rub their co-workers the wrong way, swelling the ranks of the working wounded. Their words and actions create interpersonal friction that grates on subordinates, peers, and even superiors, eroding employee motivation and organizational productivity.**

Abrasive behavior is any interpersonal behavior that causes psychological distress in co-workers sufficient to disrupt organizational functioning. This behavior includes workplace bullying and harassment. Abrasive leaders can be enormously destructive, with management styles that involve intimidation, overcontrol, emotional volatility, and inappropriate sexual, racial, and ethnic comments or behaviors. Occurring on a continuum from mild to severe, their behaviors constitute unacceptable conduct. This conduct can wreak havoc on organizations, resulting in the alienation and attrition of valued employees, costly litigation, disrupted productivity, and loss of reputation.

"Leader" refers to not only executives but all professionals who wield formal or informal authority, including physicians, attorneys, and educators who may not have direct management responsibilities for staff, patients, or students. We can all be abrasive at times, but the impact of a chronically abrasive management style is more toxic when it's exerted by people in power.

Why do bosses behave badly? In more than 35 years of coaching and researching abrasive leaders, I've learned they experience perceived employee incompetence as a direct threat to their own competence: "I struggle with people who can't move ahead. I have the patience of a wounded rhino. I can't deal with people who stand in the way of my vision." They then reflexively defend against this perceived threat with aggression: "I have trouble when people put blocks in front of me—I'm ruthless; I hang them out to dry." These so-called bully bosses view their use of aggression as both necessary and noble to achieve

organizational goals: "Sometimes you've got to kick people to get them moving."

Although occasionally aware that they are perceived negatively by co-workers, they are generally blind to their role in generating those perceptions: "They have it out for me because they're not willing to put in the time or energy." Sadly, these leaders are entirely unaware or only minimally aware of the nature and degree of their destructive impact on others: "I can't believe that people think I'm out to get them. I'm just trying to get the job done. It's nothing personal."

In my early coaching encounters with abrasive leaders, I was astounded to discover that these individuals generally possessed high cognitive (technical) intelligence but were profoundly lacking in emotional intelligence, defined by Daniel Goleman as the ability to monitor and manage one's own emotions in order to monitor and manage the emotions of others. Contrary to the popular belief that they consciously concoct strategies to inflict harm on others, I found that the vast majority of these leaders were both insecure and emotionally ignorant. They lacked self-confidence and basic psychological insight. They were clueless—emotionally unintelligent.

What's a manager to do? Most management books don't address the challenge of managing abrasive behavior. They simply advise you, their superior, to document conduct problems and direct the individual to improve their behavior. This simplistic approach may work in managing performance problems, but it's doomed to fail with problematic conduct. Telling an abrasive leader to stop being abrasive is like telling a drowning person to start swimming. It's accurate advice, but not particularly helpful because abrasive leaders see no need to change. And even if they do, they know no better way to achieve their objectives.

## MANAGEMENT PARALYSIS

Over these many years, I've also interviewed my abrasive clients' superiors (I'll refer to them here as managers), only to learn that most of these managers avoided any action until circumstances reached crisis proportions. Most were aware of the problematic conduct, either from direct observation or from hearing complaints (negative perceptions) voiced by employees, but did nothing to intervene. I'll never forget the CEO who, when asked why he hadn't addressed his CFO's years-long abrasive behavior, responded with an embarrassed "My bad."

Why do managers avoid managing abrasive behavior? If you ask this question of the working wounded, you'll hear two hypotheses: Managers do nothing because they are heartless or spineless. In my research, I've found that the majority of managers are afraid to intervene, and their anxieties fall into two categories: the fear of being harmed by the abrasive leader ("He's turned this place around—we can't risk losing him." "What if they sue us?") or the fear of doing harm to the abrasive leader ("They already have personal problems—I don't want to add to their burdens." "I don't want to hurt their feelings. They've been so loyal to me and work harder than anyone else.").

Fearful that intervention will only make things worse, management becomes immobilized, feeling hopeless and helpless. Beyond the primary fears, additional factors contribute to this spinal paralysis:

- They don't understand it's their responsibility to manage not only performance but also conduct.
- They rely on factual evidence and discount negative perceptions. ("I can't do anything unless I have factual evidence of the behaviors.")
- They believe they can intervene only if the behaviors are illegal. ("I don't think these behaviors fit the legal definition of bullying.")
- They believe the only option to stop abrasive behavior is termination. ("We can't afford to lose this person!")
- And finally, they don't know how to manage abrasive conduct.

## MANAGEMENT BACKBONE

Not all managers are afraid. Over the years, I've encountered managers who understood their role is to support and protect their employees. These managers didn't hesitate to step in when they became aware of problematic leadership behavior, either through personal (direct) observation or indirectly from negative perceptions voiced by employees. They didn't hesitate to intervene; they brought these negative perceptions to the attention of the leader, stated limits and consequences for continued negative perceptions, and offered help.

These managers confidently managed unacceptable conduct because they had developed what I call a "Management Backbone." Let's examine the vertebrae:

1. **I am the guardian of my organization's mission and the employees who work to fulfill it.**
2. **As such, it is my responsibility to promote performance and conduct that supports our mission, and defend against unacceptable performance or conduct that threatens our mission.**
3. **It is also my responsibility to provide a physically and psychologically safe environment for our employees who work to fulfill our mission.**
4. **I have the right and responsibility to determine acceptable performance and conduct for my employees.**
5. **It is my responsibility to monitor and manage for acceptable performance and conduct.**
6. **If I don't do it, who will?**
7. **My perceptions prevail.**
8. **As a manager, I have a duty to act on my perceptions.**

## COURAGEOUS CONDUCT INTERVENTION

Managers with a backbone intervened early and, by doing so, averted the potential for formal complaints, which inevitably lead to lengthy, disruptive investigations that solve nothing. Waiting to address abrasive behavior until formal complaints arise means you've waited too long—too much damage has been done. Managers with a backbone don't succumb to spinal paralysis with debates over whether the leader's abrasive behavior is illegal. They believe they have the right and responsibility to manage abrasive behavior whether or not it is illegal. Instead, they ask, "Is it unacceptable?"

To answer this question, I recommend reliance on the following criteria:

- If my family member or friend worked in this organization, would I want them to be subjected to this conduct?
- Is the conduct disrupting organizational functioning?
- Is it in the abrasive leader's best interests to be perceived so negatively?
- Is it in your organization's best interests to ignore this conduct?

Let's listen to a courageous conduct intervention:

**Alex**: *Chris, there's something I need to talk to you about. Over the past three months, I've received complaints from co-workers about negative interactions they report having with you. I feel I have a responsibility to talk with you so we can work to resolve this.*

**Chris:** *What do you mean by "negative interactions"?*

**Alex:** *I was told that you became verbally aggressive in a meeting with your team, referring to some employees as "stupid" and "worthless."*

**Chris:** *That's not true! I never said that!*

**Alex:** *I am also aware that certain individuals from other departments no longer wish to work with you. They feel you don't treat them with respect. I was told that you will point out one person's errors to the whole group, which is perceived as humiliating.*

**Chris:** *That is not my intention at all. When I talk about one person's screw-up to the group, it's to educate all of them so the problem doesn't happen again.*

**Alex:** *Well, I have to tell you that's not how it was perceived—it was perceived as a hostile act. These negative perceptions, where people feel they are being treated disrespectfully, cannot continue. If it does, I will be forced to take further action.*

**Chris:** *How can you make these accusations when you weren't there to see what really happened? You don't know the facts!*

**Alex:** *You're right—the fact is, I don't know and cannot know exactly what happened. But I do know one thing for a fact—your co-workers perceive they are being treated disrespectfully, and these negative perceptions cannot continue. If they do, I will be forced to take further action. I want to offer you coaching specifically designed for leaders who have negative perceptions about their management style. The coaching is confidential and will give you insight into what the negative perceptions are, what's causing them, and strategies to eliminate them. I'm not able to give you a lot of specific information on the negative perceptions because people requested confidentiality when they voiced their concerns. Your coach would be able to work with you to research and provide you with those specifics.*

**Chris:** *So you're forcing me into coaching? Are you trying to fire me?*

**Alex:** *No. I am not trying to fire you, and accepting the help I'm offering is not mandatory—turning this situation around is. Look, Chris, I believe you care deeply about your work and are dedicated to our success, and I don't want you to be perceived this way. I don't want these negative perceptions to interfere with your effectiveness. I want to invest in you. I want you here for the long haul.*

Courageous conduct intervention isn't punitive; it's compassionate. If you wanted to punish the person, you could simply move to termination. Instead, you're giving your technically competent leader an opportunity to turn around his or her interpersonal incompetence. And not all abrasive leaders

require specialized coaching. For leaders exhibiting mildly abrasive behaviors early in their management careers, internal mentoring by a seasoned manager can be immensely beneficial: "Come to me when you encounter this kind of situation again, and we can talk about how to deal with it more productively. I am here to help."

## WHO CAN STOP THE SUFFERING?

Who can stop the suffering caused by bosses who bully? Laws can't stop it. Policies can't stop it. Workplace trainings can't stop it. Targets and bystanders can't stop it. Human resources doesn't have the authority to stop it. Only those with authority over the abrasive leader have the power to stop the suffering: their managers. And what does it take to stop the suffering experienced by employees, the organization, and yes, the abrasive leader? It takes courageous, compassionate intervention by a manager with the heart and spine to hold all employees accountable for unacceptable conduct. I've found that everyone benefits from courageous conduct intervention. Employee suffering ends, and workers regard their manager positively for intervening. They also express gratitude that the formerly abrasive leader cared enough to work to change.

At the same time, these leaders are deeply thankful for their manager's willingness to invest in them and extend a second chance through offered help. Finally, management reduces the potential for litigation, attrition, and anti-management sentiment, while at the same time retaining the formerly abrasive leader's valuable expertise. Definitely a win-win-win.

But what if the individual cannot change and must be terminated? Employee suffering ends, and workers regard their manager positively for intervening. Management reduces the potential for litigation because they can demonstrate they intervened. And, as I tell courageous managers in these rare cases, "You can have the peace of mind of knowing you did everything in your power to stop the suffering." AQ

*Laura Crawshaw is the founder of The Boss Whispering Institute, which is dedicated to research and training in specialized coaching for abrasive leaders. She is the author of* Grow Your Spine & Manage Abrasive Leadership Behavior: A Guide for Those Who Manage Bosses Who Bully *(Executive Insight Press).*

Management Centre Europe®

Envision your best future—and then make it happen with AMA's best-in-class, time-tested professional development solutions.

## 10 MILLION

Learners educated within the past decade

## 98%

Participants report they are using what they learned

ACCELERATING PROFESSIONAL SUCCESS FOR OVER 100 YEARS

## 92%

Fortune 1000 companies are AMA/MCE customers

## 1000+

Global network of expert faculty trainers

# Transformative Leaders

## Cultivate Emotional Intelligence

BY RITESH SETH

Leaders with high EQ are not just better at understanding and managing their own emotions; they are also adept at navigating the emotional landscapes of their teams.

In the evolving landscape of modern management, the qualities that define exceptional leadership have evolved beyond the traditional notions of management that solely prioritize metrics and deadlines. Successful leaders today recognize that unlocking the true potential of their teams hinges on a profound and often overlooked skill—emotional intelligence (EQ).

At its core, EQ is the ability to deftly navigate the intricate realms of human emotion, both within oneself and in others. It empowers leaders to cultivate self-awareness, regulate their emotional responses, and forge deep connections built on empathy and understanding. When leaders embrace this transformative mindset, they unlock a powerful catalyst for positive change.

By developing a nuanced grasp of their own emotional drivers and those of their team members, emotionally intelligent leaders can foster an environment that transcends mere productivity. They create a space where collaboration thrives, decision making is elevated, and engagement soars to unprecedented heights. This holistic approach not only enhances organizational success but also nurtures a culture of growth, resilience, and authentic human connection.

In this article, we'll explore the multifaceted dimensions of EQ, discuss its profound impact on leadership practices, and unveil strategies for cultivating this invaluable skill.

## DECODING THE LANDSCAPE OF EMOTIONAL INTELLIGENCE

EQ has five core components: self-awareness, self-regulation, motivation, empathy, and social skills. Understanding these components provides a solid foundation for exploring the impact of emotional intelligence on management practices.

**Self-awareness.** Imagine standing at the helm of a ship in turbulent waters. Self-awareness is like having a precise compass; it involves recognizing your emotions, strengths, weaknesses, values, and drivers. Leaders with high self-awareness are reflective, adaptable, and transparent, allowing them to navigate challenges smoothly. They understand how their emotions affect their thoughts and behavior, which helps them make better decisions and build stronger relationships.

**Self-regulation.** Next, think of self-regulation as the ship's sturdy hull, providing stability in stormy seas. This ability to manage one's emotions, especially under stress, is what keeps leaders from making impulsive decisions. Effective leaders who excel in self-regulation remain calm under pressure and stay focused on their goals, steering their teams with confidence and consistency.

**Motivation.** The powerful engine propelling the ship forward, in this context, is motivation. It's about having an intrinsic desire to achieve beyond expectations. Leaders with high emotional intelligence are typically driven by a passion for their work, an optimistic outlook, and a deep commitment to their organization. This internal drive inspires others and fosters a culture of excellence and perseverance.

**Empathy.** Akin to a finely tuned radar system, empathy helps leaders detect and respond to the emotions of others. This capacity to understand and share the feelings of others allows empathetic leaders to build strong relationships, understand team dynamics, and address the emotional needs of their employees. Empathy fosters trust and collaboration, essential components for any successful team.

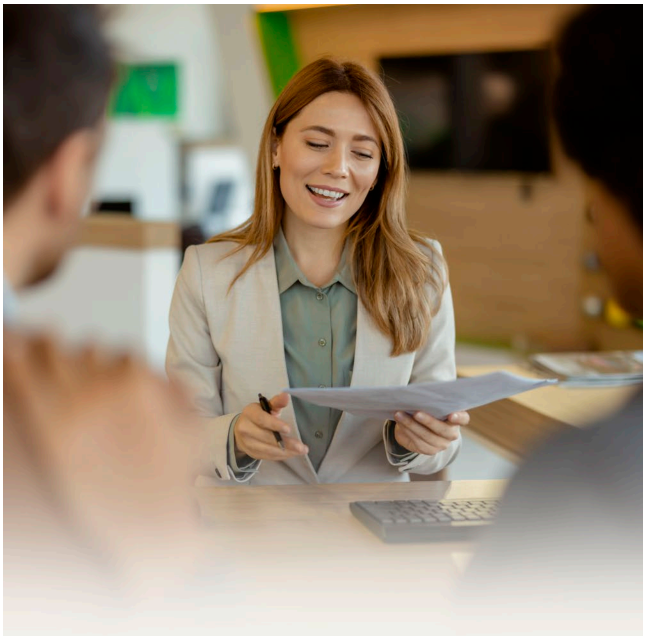
**Social skills.** Lastly, social skills are like the navigational tools that guide interactions and relationships within the team. These skills encompass effective communication, conflict resolution, and the ability to influence and inspire others. Leaders with strong social skills can build rapport, manage teams effectively, and drive organizational success. They know how to communicate their vision, resolve conflicts amicably, and foster a cooperative team environment.

## THE IMPACT OF EQ ON MANAGEMENT PRACTICES

The influence of emotional intelligence on management practices is profound and multifaceted. Leaders with high EQ are not just better at understanding and managing their own emotions; they are also adept at navigating the emotional landscapes of their teams. This ability translates into several tangible benefits for organizations, such as improved decision making, enhanced employee engagement, better conflict resolution, stronger team dynamics, and increased adaptability.

**Improved decision making.** Emotionally intelligent leaders make more informed and balanced decisions. By being aware of their own biases and emotions, they can approach problems with a clearer, more objective mindset. Additionally, their empathy allows them to consider the perspectives and emotions of their team members, leading to more inclusive and well-rounded decisions.

**Enhanced employee engagement.** Employee engagement is critical for organizational success, and emotional intelligence



Cultivating emotional intelligence is an ongoing journey of self-discovery and growth.

plays a crucial role in fostering it. Leaders who exhibit empathy and strong social skills can build trust and rapport with their employees. This, in turn, creates a supportive work environment where employees feel valued and understood, leading to higher levels of engagement and productivity.

**Better conflict resolution.** Conflict is inevitable in any workplace, but emotionally intelligent leaders are better equipped to handle it. Their ability to understand and manage their own emotions helps them remain calm and composed during disputes. Moreover, their empathy enables them to understand the emotions driving a conflict and address the underlying issues effectively, facilitating resolutions that are fair and satisfactory to all parties involved.

**Stronger team dynamics.** A team led by an emotionally intelligent leader is likely to be more cohesive and collaborative. Such leaders excel in building strong interpersonal relationships and fostering a sense of belonging within the team. They create an environment where open communication is encouraged and team members feel comfortable expressing their ideas and concerns. This leads to better teamwork and collective problem solving.

**Increased adaptability.** In a fast-paced business environment, adaptability is a key trait for successful leaders. Emotional intelligence enhances a leader's ability to navigate change and uncertainty. By being attuned to their own emotions and those of their team, emotionally intelligent leaders can anticipate and respond to changes more effectively, ensuring that their teams remain resilient and focused.

## REAL-WORLD EXAMPLES: LEADERS WITH HIGH EQ

The seemingly abstract concept of emotional intelligence becomes tangible when we look at real-world examples of leaders such as Satya Nadella and Howard Schultz, who have successfully harnessed EQ to drive their organizations forward.

When Nadella took over as CEO of Microsoft in 2014, he inherited a company that was seen as rigid and bureaucratic. Nadella's leadership style, characterized by empathy and a growth mindset, has been pivotal in transforming Microsoft into a more innovative and inclusive organization. He has emphasized the importance of understanding and valuing employees' perspectives, fostering a culture of collaboration and continuous learning. Nadella's high EQ has been instrumental in revitalizing Microsoft's corporate culture and driving its renewed success.

Similarly, Schultz's leadership of Starbucks highlights the impact of EQ on organizational success. Schultz prioritized the well-being of his employees, offering them benefits such as healthcare and education assistance, which were rare in the industry at the time. His empathetic approach extended to customers as well, with a focus on creating a welcoming and inclusive environment in Starbucks stores. Schultz's commitment to emotional intelligence helped build a loyal and motivated workforce, which in turn enhanced customer satisfaction and drove business growth.

## CULTIVATING YOUR EMOTIONAL INTELLIGENCE

Developing emotional intelligence is a continuous journey that requires deliberate practice and self-reflection. Here are a few field-tested strategies that can help leaders cultivate their EQ.

**Practice self-awareness.** The first step in developing emotional intelligence is to increase self-awareness. Leaders can start by regularly reflecting on their emotions, strengths, and weaknesses. Keeping a journal can be a helpful tool for tracking emotional responses and identifying patterns over time. Additionally, seeking feedback from trusted colleagues can provide valuable insights into how one's emotions and behaviors are perceived by others.

**Develop self-regulation skills.** Managing emotions effectively is crucial for maintaining composure and making rational decisions. Leaders can practice self-regulation by developing techniques to manage stress, such as mindfulness meditation or deep-breathing exercises. Additionally, setting clear personal goals and adhering to them can help leaders stay focused and avoid impulsive actions.

**Foster empathy.** It is a skill that can be nurtured by actively listening to others and striving to understand their perspectives. Leaders should practice active listening, which involves fully concentrating on what the speaker is saying, without interrupting or planning a response. Additionally, leaders who engage in regular one-on-one meetings with team members can better understand their employees' emotions, concerns, and motivations.

**Enhance social skills.** Strong interpersonal relationships and effective communication skills are key components of emotional intelligence. Leaders can improve their social skills by participating in team-building activities and seeking opportunities for collaboration. Additionally, practicing clear and assertive communication, while being open to feedback, can enhance a leader's ability to connect with others and manage relationships effectively.

**Seek continuous learning.** Emotional intelligence is not a static trait; it can be developed and strengthened over time. Leaders should seek out opportunities for continuous learning, such as attending workshops, reading books on EQ, and engaging in professional development programs. Additionally, finding a mentor or coach who can provide guidance and support can be invaluable in the journey toward higher emotional intelligence.

## BUILDING AN EMPATHY-DRIVEN WORKPLACE

Creating a workplace culture that values and promotes emotional intelligence requires commitment from leadership and a holistic approach. Here are several strategies for fostering an empathy-driven workplace:

**Lead by example.** Leaders set the tone for organizational culture. By demonstrating high emotional intelligence in their interactions and decision making, leaders can model the behaviors they wish to see in their employees. These include showing empathy, being transparent and authentic, and actively seeking input from team members.

**Encourage open communication.** Open and honest communication is essential for building an empathy-driven workplace. Leaders should create channels for employees to share their thoughts, concerns, and feedback without fear of retribution. Regular town hall meetings, anonymous feedback tools, and open-door policies can facilitate this open communication.

**Provide training and development.** Investing in training and development programs that focus on emotional intelligence can help employees at all levels enhance their EQ skills. Workshops, seminars, and online courses on topics such as active listening, conflict resolution, and stress management can equip employees with the tools they need to navigate emotional challenges effectively.

**Recognize and reward empathetic behavior.** Recognizing and rewarding behaviors that exemplify emotional intelligence can reinforce the importance of EQ within the organization. Leaders can implement recognition programs that highlight acts of empathy, collaboration, and effective communication. This not only motivates employees to develop their own emotional intelligence but also helps embed these values into the organizational culture.

**Foster a supportive environment.** Creating a supportive work environment where employees feel valued and understood is crucial for promoting emotional intelligence. Leaders should prioritize employee well-being by offering resources such as mental health support, flexible work arrangements, and opportunities for professional growth. Additionally, fostering a sense of community and belonging through team-building activities and social events can enhance emotional connections in the workplace.

## THE QUINTESSENTIAL INGREDIENT FOR TRANSFORMATIVE LEADERSHIP

While the importance of emotional intelligence in leadership has been recognized for decades, its role has become paramount in our current era of rapid change, global interconnectedness, and evolving workforce dynamics. Emotional intelligence is no longer just a desirable trait but the quintessential ingredient that separates truly transformative leaders from the rest.

This vital skill set empowers leaders to navigate the complexities of the modern workplace with finesse, unlocking a myriad of benefits. From enhanced decision making and heightened employee engagement to adept conflict resolution and cohesive team dynamics, the impact of EQ reverberates across all facets of organizational success and adaptability.

Cultivating emotional intelligence is an ongoing journey of self-discovery and growth. Leaders must embrace this continuous learning process, fostering empathy within their organizations and leading by example. As they embark on this transformative path, they will forge stronger relationships, inspire their teams, and steer their organizations toward unprecedented heights of success.

Emotional intelligence is the catalyst that propels leaders and their teams to reach their full potential, transcending the limitations of traditional management approaches. It is the key to unlocking a future where leadership is defined not by authority but by the ability to connect, empathize, and inspire. AQ

*Ritesh Seth is co-founder of Empathy Employer and a seasoned leader who is passionate about developing emotionally intelligent workplaces and helping businesses amplify their organizational culture.*

Navigating Uncertainty:

# THE ART OF ASKING THE RIGHT QUESTIONS

BY JIM FRAWLEY

# Adaptability is no longer just a desirable trait. It's a necessity.

Effective management in times of uncertainty hinges on the ability to navigate the unknown, make informed decisions, and lead teams through turbulent waters. Our success in adaptability is determined in the actions we take on the precipice of change, and a crucial element of this adaptability is the ability to ask good questions. Not just any questions, but ones that are thoughtful, strategic, and geared toward uncovering deeper insights without judgment or assumption. These questions lay the foundation for quick and productive decision making.

## LAYING THE FOUNDATION FOR CHANGE MANAGEMENT

Since change is so dynamic and multifaceted, we need a multifaceted approach to giving ourselves the best chance of success and adaptation when it arrives—one that will allow the flexibility we need to respond to whatever the world throws our way.

Managing change is a process. The art of change management consists of four primary pillars: awareness, preparation, learning, and wisdom. First, a degree of self-awareness is required. This comprises a basic understanding of who we are, what we value, and what we believe to be true about the world and how that informs the way we interact with others. Next comes preparation, and with proper preparation, we become learners. This experience fosters wisdom and the ability to make effective decisions in the moment, without chronic, agonizing stress or fear.

Between preparation and wisdom, there's an opportunity to build on the knowledge we possess from experiences through strategic questioning. Asking questions expands a person's perspective based on the belief systems and experiences others share in the process. Adaptability demands a certain level of collaboration in this way, challenging people to align and co-create responses to change. To do that well, you must have diversity in perspective and experience.

## THE ROLE OF EXPERIENCE IN FORMULATING QUESTIONS

While experience alone cannot prepare us for every change, it is a valuable component in crafting useful questions. Experienced managers have a wealth of knowledge and insights that can inform their questioning approach. They know which questions to ask, how to frame them, and how to interpret the answers. Experience helps in discerning which aspects of a situation are most critical and in predicting potential challenges.

While there are vast differences between the market crash of 2008 and the COVID-19 pandemic, someone who navigated 2008 may have valuable experiences to share with someone who is struggling with the economic impact of the pandemic. This experience alone is not sufficient in guiding someone through the unknown, but it's a strong catalyst in providing answers to insightful questions.

For this reason, reliance on experience must be balanced with openness to new perspectives. In times of uncertainty, unprecedented challenges may arise, requiring innovative thinking and fresh perspective. This is where collaborative questioning comes into play. By engaging the team, managers can encourage diverse viewpoints and foster an environment where every question is valued.

## THE POWER OF QUESTIONS IN CHANGE MANAGEMENT

As rudimentary as it sounds, understanding precisely what a question is will completely change one's management style. A question should be defined as a genuine request for information. The person asking legitimately does not know the answer. Pure curiosity drives away judgment, allowing the perspective of other individuals to shine.

In uncertain times, managers and employees alike face a flood of complex challenges that require more than just experience and intuition to solve. While past experiences provide a foundation, they must be supplemented with a rigorous questioning strategy to adapt effectively. This is where understanding the types of questions—objective, reflective, interpretive, and decisive—becomes essential.

**Objective questions.** These are fact-based questions that aim to gather concrete information. For instance, "What are the current market trends?" and "What resources do we have at our disposal?" Objective questions help us establish a clear understanding of the present situation, laying the groundwork for informed decision making.

**Reflective questions.** Reflective questions encourage introspection and help in understanding experiences and feelings. Questions like "How did we handle similar challenges in the past?" and "What lessons have we learned from previous crises?" allow us to tap into memory and leverage past experiences to inform current strategies.

**Interpretive questions.** These questions delve into meanings and implications, helping to make sense of data and situations.

Asking good questions is the secret bridge between a lack of preparedness and a confident approach to unpredictable change.

Examples include "What do these trends suggest about future consumer behavior?" and "How might our team dynamics impact our adaptability?" Interpretive questions push us to think beyond the surface and understand the broader context and potential consequences.

**Decisive questions.** These are action-oriented questions that drive decision making. For example, "What steps should we take next?" and "Who needs to be involved in this decision?" Decisive questions are crucial for translating insights into actions, ensuring that plans are executed effectively.

## CULTIVATING A QUESTION-DRIVEN CULTURE

For managers to effectively navigate uncertainty, fostering a culture that values and encourages good questions is paramount. This involves:

**Promoting curiosity.** Encourage team members to ask true questions, explore new ideas, and challenge assumptions. Curiosity drives innovation and continuous learning.

**Listening actively.** Pay attention to the questions being asked and the insights they generate. Active listening demonstrates that questions are valued and that diverse perspectives are welcome.

**Learning continuously.** Embrace a mindset of ongoing learning and development. Adaptability requires that you stay informed about new trends, technologies, and methodologies.

**Encouraging collaboration.** Facilitate open dialogue and collaboration. Diverse teams bring varied experiences and viewpoints, leading to more comprehensive questioning and better solutions.

Effective management in times of uncertainty is deeply rooted in the ability to ask the right questions. By understanding and employing objective, reflective, interpretive, and decisive questions, managers can navigate the complexities of change more effectively, and therefore lead by example to allow their teams to do the same.

Experience plays a crucial role in informing these questions, but it must be complemented by a willingness to embrace new ideas and perspectives. Cultivating a question-driven culture will not only enhance adaptability but also drive innovation and resilience in the face of uncertainty. As we continue to navigate this unpredictable world, the art of asking good questions will remain a cornerstone of effective management and the promotion of adaptability.

Asking good questions is the secret bridge between a lack of preparedness and a confident approach to unpredictable change. In mastering this skill, we're better positioned to make quick and informed decisions, whether in the workplace or in our day-to-day lives. It's these decisions that drive progress through challenging times and ensure we make it through, all the while developing adaptability amid times of uncertainty. AQ

*Jim Frawley is a former corporate Manhattanite turned speaker, writer, entrepreneur, and coach on a mission to restructure stale models of development to better equip every individual to navigate change.*

# Corporate Learning Solutions

## PRIVATE GROUP TRAINING

# ACHIEVE YOUR ORGANIZATION'S STRATEGIC GOALS THROUGH THE DEVELOPMENT OF YOUR PEOPLE

**CORPORATE LEARNING SOLUTIONS is a specialized division of MCE that designs training for groups and teams to help them achieve greatness.**

**How We Ensure Results.** Our engagement team sets the highest standards for effectively implementing your learning initiatives—providing a structure that connects targeted skills and behaviors to your key performance indicators through practical, real-world application.

**Overcome business challenges and create new opportunities with a range of content that helps you:**

- **Reduce churn and retain valued employees**
- **Achieve revenue growth**
- **Minimize costs and reduce risk**
- **Improve employee experience**
- **Increase organizational resilience and morale**
- **Facilitate collaboration and problem-solving**
- **Develop, upskill and reskill**

Investing in the development of your people allows them to learn, practice, apply new knowledge, and share insights—positively impacting their performance and enabling them to drive business outcomes and a meaningful ROI for your organization.

**EXPERIENCE-LED • OUTCOME-DRIVEN • CUSTOMER-FOCUSED**

# Four Key Strategies to Invest in Growth

BY JENNIFER RECLA

Imagine it's the start of the workday and you have a few moments to yourself to think, get organized, and plan your day. You notice a note to yourself: "Make more time for learning and development." You know this is important and wonder if you can spare an hour this morning for growth.

Then the emails start coming in, the messages start piling up, and your first meeting of the day is fast approaching. "Learning" is put on the back burner once again. You want to invest in growth, but there never seems to be enough time.

But what if "learning" was already built into your calendar and integrated into your team engagements?

This article presents some best practices from my experience with leading teams in the learning and organizational development space over the past decade. Before diving into the specifics, it's important to understand some basics of developmental psychology and why being intentional in our growth is critical to our success.

## INTENTIONAL GROWTH IS KEY

Developmental psychology focuses on studying how individuals grow, develop, and change across their lifespan. Child development, marked by physical, cognitive, and emotional milestones, is supported by structured learning environments in schools. In contrast, adult development is more nuanced and less linear, characterized by abstract thinking, emotional regulation, and the ability to navigate complex social dynamics. Work environments often prioritize productivity and outcomes over structured learning and growth, making it challenging to set aside learning time.

However, not making space for individual and collective growth can lead to a lack of innovation, poor performance, and lower results. By consistently working on ourselves, we contribute positively to our relationships, model growth, and create a supportive environment in which others can thrive and achieve positive outcomes.

Although we know that growth leads to better performance, it's not easy to consistently make time to work on ourselves. I've found that several common barriers prevent us from prioritizing growth.

## BARRIERS TO INVESTING IN GROWTH

Identifying which barriers are holding you and your team back from growing will help you determine the best solutions to combat them.

**Finding time.** One of the most common barriers is simply not having enough time. Busy schedules, demanding workloads,

and personal responsibilities can make it challenging to prioritize learning.

The solution is to identify activities to stop, pause, minimize, or automate to create space for learning. Block your calendar weekly for dedicated thinking, planning, and learning time. Limit distractions during this time by turning off email and instant messaging.

**Prioritizing others.** Many individuals, especially those in leadership roles, prioritize others' needs first. While supporting others is important, neglecting individual and team growth can lead to burnout and stagnation.

The answer is to establish the top priorities, goals, and values for yourself and your team. Use that information to shift your focus to items that matter most, instead of what seems most urgent. Develop healthy boundaries for you and your team and learn the art of saying no strategically.

**Overcoming a lack of resources.** Limited access to resources such as time, money, or educational opportunities can hinder our ability to invest in development opportunities.

The solution is to get creative with how you learn and grow. Your resources may be limited, but there are numerous free or low-cost ways for development. You and your team can volunteer or speak at conferences to get free or discounted tickets, get books from the library and conduct book club sessions, sign up for free trade magazines, or listen to podcasts.

**Feeling settled.** We believe that we've reached the position we want so we don't need to continue to grow. We get comfortable and settled in our current roles and routines. This can prevent us from seeking out new learning opportunities.

The solution is to cultivate a growth mindset on your team. Encourage others to step out of their comfort zones and embrace failure and challenges as growth opportunities. Approaching work with this mindset will accelerate progress and enable you and your team to navigate setbacks more effectively. Cultivating a growth mindset is so important that I dig deeper into this concept next.

## DEFINING A GROWTH MINDSET

Reflecting on my professional journey, I can see that leaning into a growth mindset is a critical success factor in leading and growing teams. While I was vaguely familiar with the concept of a growth mindset early in my career, I didn't fully comprehend its depth. Initially, I believed my love for learning was evidence enough of possessing one.

However, a growth mindset goes beyond mere enthusiasm for learning. It's about embracing challenges, viewing failure as a steppingstone rather than a roadblock, and continually developing one's skills and intelligence. It involves being comfortable with failure, accepting imperfections, and embracing the journey of continuous improvement.

As you embark on your journey with the four keys for investing in growth, I encourage you to start by embracing and strengthening your growth mindset. I recommend Carol Dweck's book *Mindset: The New Psychology of Success* to explore this concept more.

## FOUR KEYS TO INVEST IN GROWTH

Now that you understand the importance of and barriers to growth, let's explore four strategies for managers to invest in both individual and team growth. These keys can be integrated into your work calendar as soon as today.

**Establish a formula for team meeting check-ins.** By adding a standard check-in to the beginning of your team meeting agendas, you can foster connection and create a space for individuals to share their current state and ask for help. Implementing this with my former team opened the door to honest and open conversations and better support of each other's workload.

> The key to developing others starts with developing ourselves, and by getting our house in order as a learning team, we can elevate the learning experience and drive impactful results for our organizations.

Team members may feel resistant, but I encourage you to experiment with it and ask for feedback. You can start small with one question from the sample below or rotate questions at each meeting. Using pictures, emojis, or an emotions wheel can help prompt individuals to share.

### Sample check-in:

- ✓ How are you doing/feeling?
- ✓ What is your big goal for the week?
- ✓ How can we support you?
- ✓ What is one thing you learned this week?

**Engage in professional and career development conversations.** In establishing regular professional and career development conversations, in addition to your regular 1:1 meeting with direct reports, you can focus solely on your employees' progress toward their development goals. They should drive the conversation, but you may need to prompt them with questions.

In my previous team, we conducted these sessions quarterly. We tied learning directly back to work goals and career growth progression frequently throughout the year, leading to deeper discussions and increasing the likeliness of the team reaching their goals.

### Sample questions for your direct reports:

- ✓ Is there anything you want to focus on related to professional or career development in our conversation today?
- ✓ Check-in on progress toward professional development and business goals: What is going well? What could be better? How can I support you?
- ✓ How have you utilized your strengths this quarter?
- ✓ Review career plan: Are you progressing toward your vision? Are there any new challenges/barriers?
- ✓ How are you applying what you learned from this past quarter?

**Schedule retreats for fostering cohesion and innovation.** Time together as a team is critical for collaboration and connection. Creating quarterly connections as a team to dig into strategy and create deliberate space for team learning allows you to connect in person offsite—although virtual connections can be very effective if that is your only option. Develop the agenda collaboratively with your team with clear objectives for what you hope to accomplish. Obtaining an outside facilitator or educator to lead the team learning portion of your agenda can enrich the experience.

A variety of strengths-based tools can be used for these engagements, such as Gallup's CliftonStrengths, Insights Discovery, or the Table Group's Working Genius tool. These type of tools can help you and your team create a common language for working more collaboratively and having a more focused approach to growth.

### Sample retreat agenda:

- ✔ Strategic plan review: What's on track? What's behind? Where do we need support?
- ✔ Brainstorming: We've identified three gaps in our workflow. Let's discuss solutions and map out a plan to close these gaps.
- ✔ Team building: Conduct a team strengths assessment, discuss the results, and develop an action plan for team integration and application.

**Establish dedicated peer-to-peer learning and problem-solving time.** After conducting a psychological safety assessment with my former team, we identified a need to be more deliberate with learning among team members. This led to the development of a safe space to promote collective learning and connection among peers without their leader. Team members shared their best practices and could dive deeper into topics relevant to their day-to-day operations.

Ask one of your team members to lead the coordination of these engagements. The group collectively manages the agenda and rotates who facilitates or teaches certain aspects. The agenda should include opportunities for skill development, collaborative problem solving, and feedback.

### Sample peer-to-peer agenda:

- ✔ Project check-in (as needed): Briefly describe the project you are working on; share a milestone or challenge; share support needed from the group or ask for feedback.
- ✔ Main topic examples: Best practices in using AI; training on how to use new software; debriefing learnings from a recent conference.
- ✔ Lessons learned: Sharing of lessons related to a recent project close.
- ✔ Next schedule: Who's got a topic? A project or initiative they want feedback on?

Integrating these four keys into your calendar and agendas lays the foundation for a positive learning culture. Growth becomes part of what you do instead of one more thing. When you sit down at the start of the workday, morning beverage in hand, "development" is already built into your work.

## MEASURING IMPACT

The four keys help you build growth time into your calendar, but how do you know you're truly making an impact? We saw tremendous growth internally over my five years with the learning and development team at Colorado Access, and it had a positive ripple effect on our organization.

### Here are a few examples of the impact we measured:

- Organizational engagement with professional development increased by **36%**.
- Organizational satisfaction with our programming increased by **41%**.
- Our team grew from five to **seven** members.
- Team trust reached **83%** favorability.
- The team had a **0%** turnover rate.

It's important to establish key metrics that identify your team's growth and the impact on the broader organization and your customer base. For your team, establish three or four key metrics. These could include employee engagement scores, team trust and psychological safety ratings, retention and promotion rates, and skills-based assessments.

For the organization, establish three or four key performance indicators. These could include customer engagement scores, productivity measures, error rates, and project milestones. Use these measurements as guides to tweak your four keys to ensure maximum effectiveness and impact.

With these strategies, you can build intentional growth into your leadership practice. Share and discuss these four keys and best practices with your team in your next meeting and ask for feedback. How do they want to structure individual and collective growth moving forward?

Recognize what's getting in the way of nurturing your growth. Set aside time and space for learning. Lean into creative solutions, experiment along the way, and tap into lessons learned to help you continuously improve. The key to developing others starts with developing ourselves, and by getting our house in order as a learning team, we can elevate the learning experience and drive impactful results for our organizations. AQ

*Jennifer Recla is a coach, mentor, learning consultant and designer specializing in navigating tough conversations, finding purpose, conflict management, resiliency, communication, time management, mindset, and strengths-based leadership. She uses a variety of assessment tools to help individuals and teams leverage strengths and find the most effective and impactful ways to work together.*

# Strategic Moves for New Managers

BY HENRY CRISS

Transitioning from a peer to a managerial role is a significant career milestone that requires careful navigation and a strategic approach. This transition involves a shift in responsibilities and a transformation in how one is perceived by former peers and new subordinates. The move to a management position often entails a paradigm shift in both mindset and daily activities. As a manager, you are no longer responsible solely for your own work but also for the performance and development of your team. This change requires new skills and a different approach to workplace relationships.

## BUILDING CREDIBILITY AND TRUST

One of the first challenges new managers face is building credibility with their team. Former peers may question your new authority or doubt your managerial capabilities. To establish credibility, you must demonstrate competence by showing that you understand the job and the industry. This might involve leveraging your existing technical skills or quickly acquiring new knowledge pertinent to your role. Consistency in your decisions and actions builds trust and demonstrates that you are reliable and fair. Always act with integrity, be transparent in your decision-making processes, and avoid favoritism.

Transitioning to a managerial role also requires you to establish your authority without alienating your team. Set clear expectations by communicating your goals to provide your team with a roadmap and reduce uncertainty. Make decisions confidently and promptly, as indecisiveness can erode your authority and cause your team to lose confidence in your leadership. Maintain open lines of communication, encourage feedback, and be approachable to foster a collaborative environment.

Leadership is a crucial aspect of management, and moving from a peer to a supervisor role requires the development of several key leadership skills. Emotional intelligence, which involves understanding and managing your emotions and those of your team members, is essential. Be prepared to handle conflicts effectively by listening to all parties, understanding the root causes, and facilitating a fair resolution. Learn to inspire and motivate your team by recognizing their achievements, providing constructive feedback, and supporting their professional growth.

## NAVIGATING RELATIONSHIPS

As a new manager, your relationships with former peers will inevitably change. Navigating these changes gracefully is crucial for supporting a positive team dynamic. Respect professional boundaries while maintaining good relationships. Balance friendliness with authority to ensure you can make difficult decisions when necessary. Be transparent about the challenges and changes that come with your new role to manage expectations and reduce potential resentment.

The transition to management is an ongoing process, and continuous learning and adaptation are vital for long-term success. Regularly seek feedback from your team and superiors to identify areas for improvement and understand the impact of your leadership style. Engage in continuous professional development by attending workshops, acquiring relevant certifications, and staying updated on industry trends. Reflect on your experiences regularly and adapt your strategies as needed, demonstrating flexibility and a willingness to change.

Recognize the skills and experiences that have brought you to this point and leverage them to your advantage. Use your technical expertise to guide and mentor your team, providing valuable insights. Leverage existing relationships to foster a collaborative and supportive team environment. Apply your problem-solving skills to managerial challenges, as your ability to analyze and address issues will be crucial in your new role.

To ensure a smooth transition, you need to set yourself up for success from the beginning. Create a 90-day plan outlining your goals and objectives for the first three months, including building relationships, understanding team dynamics, and identifying key priorities. Take the time to understand each team member's strengths, weaknesses, and motivations to assign tasks effectively and provide necessary support. Promote a positive and inclusive team culture by encouraging open communication, collaboration, and mutual respect.

## MANAGING UPWARDS

Effective management also involves managing relationships with your superiors. Establishing a good rapport with your own managers can provide you with the support and resources needed to succeed. Keep your superiors informed about your team's progress and any challenges you are facing through regular updates, demonstrating accountability and engagement. Do not hesitate to seek guidance and advice from your superiors, as their experience can provide valuable insights and help you navigate complex situations. Ensure that your team's objectives align with the broader organizational goals to secure support and resources from higher management.

To better understand how these skills apply in practice, consider the experience of Emma, whose name has been changed to keep her anonymous. Emma sat at her desk, a mixture of excitement and nervousness swirling inside her. She had recently been promoted to a managerial position in her company's marketing department, and her first major task was to lead the launch of a new product campaign aimed at increasing the company's market share in the healthcare industry. Understanding the importance of managing upwards, Emma knew that establishing a good rapport with her superior, John, the director of marketing, was crucial for her success. However, her initial approach didn't go as planned.

In her first few weeks, Emma decided to handle everything independently, believing that she needed to prove her competence. She rarely sought John's input, confident that her regular email updates were sufficient. However, she soon noticed that her team was facing significant delays due to supply chain issues with their printing vendor. Morale was beginning to dip.

During one of their few face-to-face interactions, Emma quickly mentioned the delays in passing, assuming John would appreciate her handling it autonomously. "We're having some delays with our printing vendor, but I'm on it," she said hurriedly, not giving John a chance to ask questions or offer advice.

John frowned slightly but nodded, clearly wanting more information than Emma had provided. The next week, the delays worsened and the team fell further behind schedule. Emma felt the pressure mounting and realized her approach wasn't working. It became clear she needed a more effective strategy for managing upwards.

Recognizing her mistake, Emma decided to change her approach. She scheduled a one-on-one meeting with John, prepared to discuss the campaign in detail and seek his guidance. As she entered John's office, she felt a mixture of apprehension and determination.

"John, I want to give you a detailed update on our campaign and discuss some challenges we're facing," she began. Emma handed John a comprehensive report summarizing key achievements, ongoing projects, and potential obstacles.

"This week, our team completed the initial design phase of our marketing materials ahead of schedule," Emma said confidently. "However, we are encountering significant challenges with our printing vendor, which may delay production. To address this, I'm exploring alternative suppliers and adjusting our timeline. I wanted to keep you fully informed and discuss potential solutions."

John nodded, appreciating Emma's newfound transparency and proactive approach. He provided valuable advice on navigating supply chain issues and suggested a few reliable vendors he had worked with in the past. Emma took diligent notes and followed up with the suggested vendors, ultimately securing a new supplier that met the project's requirements.

As the weeks passed, Emma continued to keep John updated with regular reports and used dashboard tools to provide real-time updates on the team's progress. She sought John's guidance on handling complex situations, such as negotiating with suppliers and managing team dynamics. Emma valued John's insights and applied them to her management approach.

During a monthly review meeting, Emma presented the team's progress and highlighted how their efforts contributed to the company's strategic goals. "Our current project focuses on improving customer engagement and response times,

which aligns with our company's goal of enhancing customer satisfaction and increasing market share in the healthcare industry. Here's how we plan to achieve it," she explained, her voice steady and confident.

Emma's transparency and consistency in communication helped build trust with John. When a critical issue arose—a sudden budget cut due to company-wide cost-saving measures—Emma was honest and upfront about the impact on the campaign. She immediately scheduled a meeting with John to discuss the challenges and potential solutions.

"We're facing a sudden budget cut that will affect our campaign's scope and timeline," Emma began, her tone serious but composed. "Here's what happened and how we're addressing it. I wanted to inform you right away and seek your advice on how best to proceed. We could either scale back the campaign or reallocate funds from less critical projects."

John appreciated Emma's honesty and worked with her to find a solution. Together, they decided to reallocate funds from a less critical project, ensuring that the new product campaign remained on track.

By managing upwards effectively, Emma secured the support and resources needed for her team to succeed. She built a strong, trusting relationship with John, leveraged his expertise, and ensured that her team's objectives aligned with the broader organizational goals. This proactive approach not only enhanced Emma's effectiveness as a manager but also contributed to the overall success of the organization.

## ADDRESSING COMMON CHALLENGES

New managers often face several common challenges, and being prepared to address them can help ensure a smooth transition. Many new managers experience impostor syndrome and feel inadequate or unprepared for their new role. Acknowledge these feelings but do not let them undermine your confidence. Remember that your promotion is a recognition of your abilities and potential. Former peers may resist your new authority, so address this issue by being fair, consistent, and transparent in your decisions. Balancing your new managerial responsibilities with your previous workload can be challenging, so prioritize tasks and delegate effectively to manage your workload efficiently.

Impostor syndrome is a common experience among new managers, characterized by feelings of inadequacy despite evident success. To combat this, try these tactics:

**Acknowledge your achievements.** Regularly remind yourself of your accomplishments and the reasons behind your promotion. Keep a journal where you record your successes and positive feedback from colleagues and superiors.

**Seek support.** Talk to a mentor or a trusted colleague about your feelings. They can provide reassurance and share their own experiences of overcoming similar challenges.

**Pursue continuous learning.** Engage in continuous professional development to build your skills and confidence. Attend workshops, read management books, and seek out training opportunities relevant to your role.

Transitioning from peer to manager can create tension as former colleagues adjust to your new role. To address this, try these tactics:

**Communicate clearly.** Hold a team meeting to discuss your new role and what it means for the team. Be open about the changes and encourage feedback and questions.

**Be fair and consistent.** Apply policies and make decisions fairly and consistently to build trust and respect. Avoid favoritism and ensure that all team members are treated equally.

**Show empathy.** Understand that your former peers may need time to adjust. Show empathy and be patient as they adapt to the new team dynamics.

Establishing trust and authority with your team is crucial. Here are some suggested tactics to handle this issue:

**Lead by example.** Demonstrate the behavior and work ethic you expect from your team. Your actions will speak louder than words.

**Be transparent.** Be open about your decision-making processes and the reasons behind them. Transparency builds trust and shows that you are fair and consistent.

**Seek feedback.** Regularly seek feedback from your team and act on it. This shows that you value their input and are committed to continuous improvement.

By addressing these common challenges with a proactive and strategic approach, new managers can navigate their transition effectively, build strong relationships with their team and superiors, and establish themselves as competent and respected leaders.

Transitioning to a managerial role is a significant step in one's career that comes with its own set of challenges and opportunities. By understanding the nuances of this transition and implementing the strategies discussed here, you can navigate this change effectively and establish yourself as a competent and respected manager.

Building credibility, establishing authority, developing leadership skills, and continuously learning and adapting are key to a successful transition. You can further enhance your ability to lead effectively by leveraging your existing strengths, setting yourself up for success, managing upwards, and addressing common challenges. Embracing these strategies will not only help you in your new role but also pave the way for future growth and development in your managerial career. AQ

*Henry Criss is CEO of The Fraum Center for Restorative Health on Hilton Head Island, S.C.*

# The Evolution of a PROJECT MANAGER

BY BRYAN BERTHOT

In many jobs, particularly those requiring technical subject-matter expertise, obtaining upward mobility may be a challenge. If you excel at your job as a programmer or an engineer, you may discover that your reward for doing a good job is…more work. To advance to a managerial job, you need to be proactive. This means that you must create a structured plan to transition to the management role you covet.

Here are some of my paths to success, peppered with my experiences in the project management field:

## USE YOUR CURRENT ROLE AS A LAUNCHING PAD

It's not enough to aspire to a managerial job later in your career. First you need to establish your reputation by excelling at your current role. Think of each position, particularly early in your career, as a launching pad to your ultimate management job.

Changing jobs periodically is no longer a red light for future employers if you can demonstrate that you are advancing in your career. At each stop in your career path, ask peers, supervisors, and clients to help you document your success by providing references for you in job-related social media sites such as LinkedIn, Xing, or Polywork.

## SET RISING TO MANAGEMENT AS A PERFORMANCE GOAL

These days, most employees have input into setting their own performance goals on the job. These should include both short-term, tactical goals and longer-term, strategic goals. If you aspire to a managerial role, let your employer know about it. Collaborate with your supervisor to identify managerial tasks that you may assume. Doing so will make his or her life easier and will demonstrate your aptitude to the organization. Also, if you see an opportunity to assume neglected management tasks, don't wait to be asked—seize the opportunity and start doing them.

Some organizations have a formal management training program. When you show your interest, an opportunity to enter management may materialize within your own company.

## DEVELOP YOUR OWN CAREER PATH

Have you ever been asked that job interview question, "Where do want to be five years from now?" You need to think about where you want to be and devise a career path that will help you achieve your goal. This may mean strategically changing jobs and changing industries.

Rather than blindly applying for jobs, you want to target specific jobs in particular industries. Generally, you must have some level of technical knowledge in the industry where you are applying for a job, so develop that expertise early in your career. For example, software development firms often expect their project managers to have some coding ability. This is because the project manager often serves as a liaison between developers and project stakeholders. Although I was never a great software developer, I became competent, and it allowed me to "speak the language" to both developers and project stakeholders.

I started out in the public sector mental health field and then obtained progressively responsible project manager jobs in the biotechnology and medical device sectors. Once I established my reputation as a project manager, I intentionally made lateral moves to the telecommunications industry to expand the breadth of my experience and to demonstrate that I was a quick study.

## GET MANAGEMENT TRAINING BEFORE APPLYING FOR THE JOB

A key to making a successful transition to management is to get specific training before you are thrust into this role on the job. In a case study by myself and Mike Flood ("Hero Plumbers: The Transitional Challenges of a Family-Owned Business" in the December 2023 edition of *Muma Case Review*), we noted that there is often a gap between when employees get their first leadership position in a firm and when they receive training. When such training does occur, it is often negatively affected by trainee time constraints and the fact that the training begins when the company is in crisis. You don't want to be in management training when you are under the gun to perform.

The type of management training may matter. Some companies have formal management training programs to foster the advancement of promising employees. Rochelle Shenk reported in her May 2018 article ("Small-Business Owners Find Value in Leadership Training" in *Central Penn Business Journal*) that management trainees typically prefer some form of mentorship (such as modeling behavior) to academic training. For example, the trainee is given management responsibilities and supported by another manager.

## FIND A MENTOR

Mentoring relationships can improve an employee's job satisfaction, career advancement, and professional networking, and such relationships may be critical when an employee is trying to make a career transition. The mentor may be an individual at the company who possesses the desired skill set. A potential source of mentors outside the workplace may be a professional organization that espouses best practices in the field.

For example, when I was trying to break into the project management field, I took a two-pronged approach. I found a personal mentor who was the wife of a colleague at a software development firm where I worked. She was a Project Management Professional (PMP®) certified by the Project Management Institute, and she coached me on the path to transition from a technical expert to a project manager. Additionally, I joined the Project Management Institute and the Scrum Alliance and began attending meetings of the local

chapters. These professional groups greatly improved my own knowledge and my ability to network in the field.

Later on, I found a mentor who was the director of the Agile PMO at a medical devices firm where I worked. She both trained me on Agile best practices to employ with my developer teams and introduced me to prominent speakers in the Agile world.

## AVOID JOBS WITH ROLE CONFLICTS

One challenge in making a transition to management is ensuring that the responsibilities of your new job complement your career goals. For example, if you're a stellar Python and C# coder and you're seeking a project manager role, you should avoid jobs that say "Programmer/Project Manager." There's a great deal of role conflict if you try to tackle such hybrid jobs. It may mean that you'll be writing code most of the time and will spend your weekends trying to catch up on all the project management work you should have been doing all week. It may also be a red flag that the company is unwilling to hire all the necessary resources for a team.

If you have such concerns, don't be afraid to ask questions during the interview process. Verify that the job responsibilities are aligned with your goals. It doesn't serve you or the company if the job turns out to be something other than what you expected.

## ACQUIRE FORMAL EDUCATION AND OTHER CRITERIA

Did you know that some organizations maintain specific entry criteria for their management jobs? When evaluating management job candidates, some companies revere certain educational or experience backgrounds. Others value professional credentials.

When asked for this article about employer requisites for management, Rick Krumm, VP of auditing and accounting at CarSaver, opined, "There are certain 'must haves' in my field. To go far, you need to put the time in at one of the so-called 'Big 4' firms. I worked at Deloitte early in my career. That experience was rewarding. It gave me exposure to multiple industries and allowed me to move up the food chain, in a way that otherwise wouldn't be possible."

Similarly, a media reporter specializing in business and finance stories confided to me that when she was in college, she created a target list of potential employers. She discovered that she would need to get an MBA from an Ivy League school even to be considered for her ideal job in these companies. That was the educational criterion that her potential employers viewed as a minimal threshold to consider her for an interview.

In some sectors, getting germane certifications may be the answer. For example, in my field, since the job market for project managers is quite competitive, most firms will not consider your application unless you have related certifications. This is a hard expectation. For traditional (that is, waterfall) project management, relevant certifications include the Project Management Professional (PMP®) or the PRINCE2. For Agile project management, at a minimum you want to become a Certified ScrumMaster (CSM).

Do you know what the exclusionary barriers are in your chosen field?

## MULTIPLE PATHWAYS

In her 2023 book *Smart Career Moves for Smart Women: How to Succeed in Career Transitions*, Susan Doering noted that there's no single correct pathway to make the transition to management. Look for opportunities within your own company and at competing organizations.

Use your professional network to your advantage when seeking a job. If you can't find what you're looking for, consider taking a temporary contractor assignment where you can prove that you can do the work. This may be a route to a full-time management job.

Other options are leveraging your subject-matter expertise as a consultant or becoming an entrepreneur and starting your own business. This entrepreneurship approach may be the best way to create an opportunity for yourself when you want to bring a disruptive change (a new product or service) to the market. AQ

*Bryan Berthot is a project manager consultant with demonstrated success in a wide variety of projects, from multimillion-dollar projects to business process improvement.*