

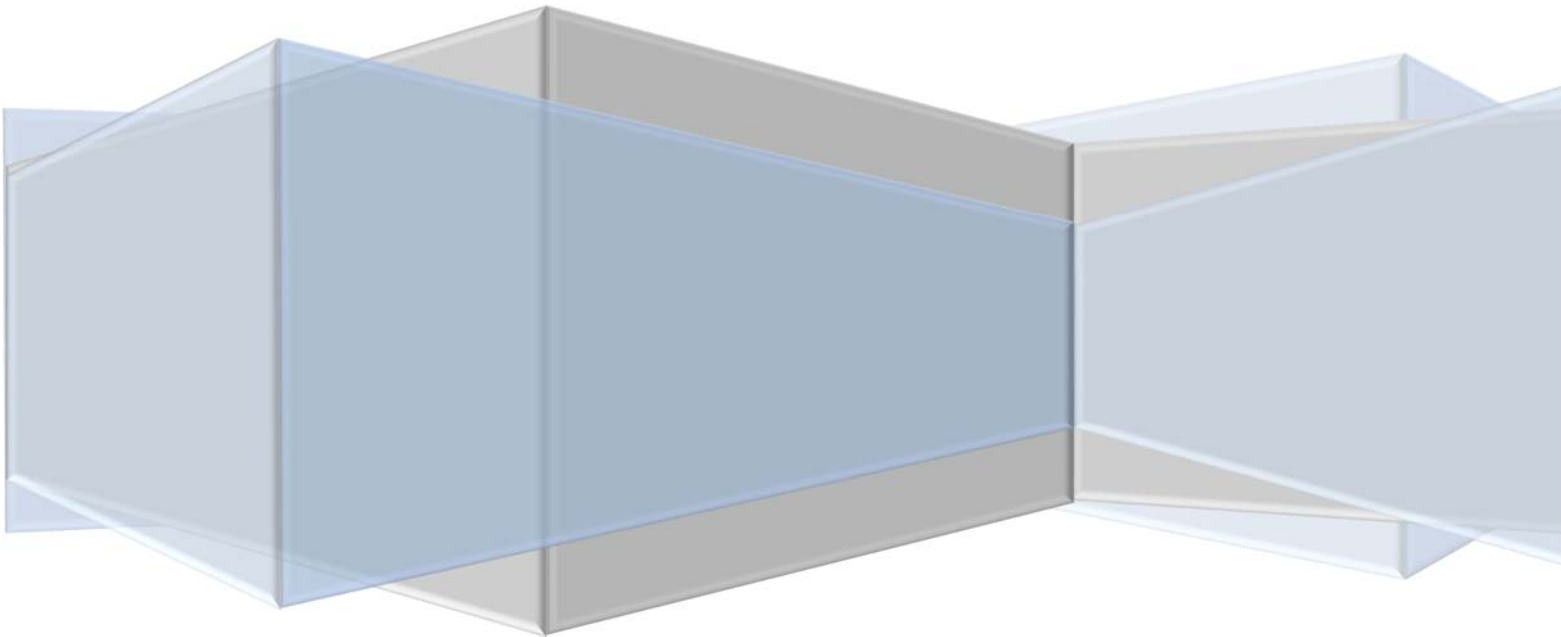


*Helping Managers and Businesses  
Succeed Through Real Experience*

# Your First 180 Days 2nd Edition

**A Workbook and Checklist to Guide New Managers**

**Name:** \_\_\_\_\_ **Hire Date:** \_\_\_\_\_



## ***Welcome New Managers!***

Congratulations on your new job, all your hard work has finally paid off! Stepping into your first management gig is an exciting time and signifies a major achievement in your career. Be proud of your accomplishment - you've earned it!

Becoming an effective manager isn't just about prioritizing tasks and assigning due dates. Instead, you should now think of yourself as a *leader* who others will look up to on a daily basis. Feels pretty nice, huh?

If you ask any experienced manager, though, he or she will tell you that as exciting as this time may be, there is also a lot to learn about your new responsibilities, especially in the early days. After all, managers and supervisors have a direct impact on – and possess a great deal of influence over – an organization.

As you step into the new job, here are just a handful of the new realities you need to be prepared for:

1. You'll have to learn how to motivate others to perform at the highest levels.
2. You will need to earn and maintain trust across your organization.
3. You will need to find creative ways to lead a team of diverse people.
4. You'll no longer be able to avoid organizational politics.
5. You will need to address concerns swiftly and effectively.
6. You'll have to carefully balance a desire to control outcomes with empowering your staff.
7. You will need to develop skills relating to coaching and developing people.

If you're a bit nervous, it's ok! It is completely normal to feel intimidated, uncertain or simply a little awkward about what you are doing from time to time. And... if you think there's nothing to it and you're asking yourself '*How hard can it be?*' you may be in for a few surprises. As you begin leading people, you'll quickly face new challenges and start making decisions on topics you have probably never dealt with before - more than you likely realized. But don't worry, MRH is here to help!

## ***What to Expect From This Guide and Workbook***

This workbook is designed to walk you through the transition into your new role as a manager or team leader over the course of your first six months. It is also structured as a checklist to guide you step-by-step through the process of integrating with your new team, as well as to focus you on crafting your own leadership approach. Managing tasks, meeting metrics, leadership skills and mentoring your staff – it's all here. You will be asked challenging questions that you should answer honestly. What scares you? What do you believe you need to learn in order to become an effective leader? ***In order to get the most out of this workbook, it's important that you make this workbook for you and you only.***

***Our recommended keys to success:***

- Print out this guide and carry it around with you over your first six months.
- Spend time reviewing all sections at the start so you know what is to come.
- Strive to work through each section in order; however, complete the list as it makes sense for you and your organization.
- Aim to complete the various activities according to the prescribed timeline, but don't be afraid to work at a pace that makes sense for your specific situation.
- Blue Box sections serve as added tip sheets, instructions, and discussion points developed by our experts to help you get the most out of this guide.
- Make notes in the space provided. Mark it up. Make it yours! Refer to your notes and comments often.

***Work at A Pace That Makes Sense for You...***

It goes without saying that *every organization is different*. The timeline we have outlined here is intended to be an average for most managerial roles. But, depending on your organization and the nature of the team you supervise, your pace may be different. You may choose to move at a faster speed than we have defined here, or you may struggle to keep up at the timeline we recommend. *That's ok!*

*...And here is why:*

Truthfully, for smaller teams and consolidated organizational structures, stepping into the role more quickly than our team has prescribed here may certainly be possible. For instance, if you have, say, 5 to 10 direct reports where everyone is physically located in the same workplace and works the same schedule, you may find it easier to complete the recommended activities that follow.

Conversely, with particularly large, complex, remote or highly virtual organizations, the pace will likely be slower because there are complicated logistics to manage. For example, if your team consists of 20 staffers, some of whom sit in a different office, and some of whom sit in another country, things just may take a little longer. Again, that's ok. Work at a pace that makes the most sense for you, your team, and the organization.

Once again, congratulations! Welcome to the tribe. We at MRH wish you the best of luck and a smooth transition.

***Now, go and get out there! Go be the best leader you can be! 😊***

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### 3. Host an Introductory Meeting with New Staff / Organization in Your First Week

Whether in person (preferred) or through a teleconference, schedule time to say hello.

Date Completed

- Introduce yourself and your personal background.
- Discuss your career trajectory.
  - Academic achievements
  - Career path, history and decision points
  - Share an interesting story or relatable professional experience you had.
- Ask employees for a brief introduction of themselves.
- Tell employees what they can expect in the near-term, such as:
  - One-on-one meetings with you
  - Project introductions for you, etc.
  - Staff meeting schedule
- Share your communication style and preferences.
- Discuss expectations of the employees, including expectations on ethics (See Box Below).
- Consider a group activity or an Ice Breaker (See Second Box Below).
- Consider hosting a team building event after the meeting to get to know employees personally.

#### **Setting Expectations with Your New Team:**

It is never too soon to begin laying the groundwork for what you expect out of your new team. In fact, the sooner you start, the better – your ‘newness’ to the organization is actually an *advantage* since you are in a very short window of time when you can ask fundamental questions and challenge established norms as an outsider. Even if you were already on the team and were recently promoted into the supervisory role, you can easily say “I know that \_\_\_\_ has always been an issue for us. I’d like to change that.”

Many new managers wonder what kind of tone they should set. Well, simply put, your expectations of your team are really the expectations you have of yourself. Your own values, behaviors and tendencies will naturally emerge as those things you want to see from your people. Avoid using generic statements like “I expect hard work” and “We are going to have a culture of accountability.” Instead, tell your employees something they haven’t heard before. Be open about your own work style and use it as the foundation for what you want to see from the team. ***Speak about the things that are truly important to you, not the things you think you’re supposed to say!***

Listing everything at once can be intimidating. Instead, spread your key messages across your first few team meetings. Identify no more than 5 to 10 items that you will discuss with the team to set your tone. Examples might include:

- Expectations on team collaboration, commitments and professionalism.
- Communication style – when to use meetings, email, phone or chat.
- How you expect employees to engage with customers or suppliers.
- What you expect in terms of employee learning and development.
- Working hours, breaks, sick time, attendance, leave and time off.

Finally, keep in mind that your new employees are going to be very interested in what their new boss will have to say when they first meet you. Setting a positive, healthy tone is easiest when you have everyone’s undivided attention!

## 6. Schedule One on One Meetings with Each Employee (See Page 53 for Template)

Schedule your first One on One meeting with each employee, in which you will:

- Discuss his or her career background.
- Ask what they are working on currently.
- Ask about work preferences (work environment, independently or on teams, etc.).
- Ask what issues they are currently facing and how you can help.
- Discuss their long-term career goals and ambitions.
- Ask what questions they have for you.

Date Completed

Even if you cannot hold all 1:1 meetings in your first thirty days, at least get them scheduled for each employee!

### Scheduled Meetings with Employees:

Employee	Date	Time	Employee	Date	Time

## Your First One on One Meeting with Your New Employees

Your ability to get results through your team will rely heavily on your knowledge of each individual’s skills, talents, motivations and abilities. One on One meetings are the best way for you to quickly learn these characteristics.

Schedule One on One meetings (at least 1 hour) with each employee in your organization at the start. Even if it takes two months for your schedules to align and for you to work through this activity with every member of your staff, take the time to meet with them individually. Your first One on One should focus on getting to know their educational background, their professional experience, as well as the tasks and projects they are actively working on. Taking the time to do this early on also sends a clear signal that you take personal interest in each employee.

Be sure to schedule follow-up One on One meetings at least once per month in order to maintain regular face time with your staff. They serve as an excellent touch point with your staff and keep you informed of what’s really going on.

## 15. Learn Your Market, Customers and Industry

Date Completed

*In order to enhance your ability to make decisions, you need to understand your industry. Seek answers to the following questions:*

- *Who are our top external clients, customers or consumers?*
- *Who are our main competitors and where do we compete?*
- *What is unique about our business model? What is our competitive advantage?*
- *What is our current plan for growth and expansion?*
- *What economic sectors or indicators define growth and contraction of our company / organization?*
- *How does our team contribute to the corporate / central vision and mission?*
- *What is our organization's 1-year, 3-year and 5-year plan?*
- *What strategic investments are we making today and how are they intended to meet our customers' needs? How did we arrive at selecting those investments?*

### **Get to Know the End Customers and Your Market**

Whether or not you are new to a company, make it a point to identify your customers. Your end customers – the people paying your business money for your products or services – are the people you ultimately need to think about when managing your team.

Even if your team does not work directly with external clients, your end customers should drive some of the decisions you will make. Here are three examples of managers who may have indirect relationships with customers:

- HR Managers must hire talented and skilled workers who bring value that fill a customer's needs.
- Quality Managers must ensure their internal practices comply with industry and customer standards.
- IT Managers should ensure their IT systems are compatible with a customers' system to permit electronic data exchange.

# Your First 90 Days

*ninety*

- *Goals*
- *Financials*
- *Networking*
- *Progress Check*

*six months*

## **Your First 180 Days**

- *Mentors*
- *Your Own Development*
- *Recalibrate Expectations*
- *Action Plan*

## 28. Identify Individuals Who Can Serve as Mentors

*List names of people who you feel can act as mentors to you. Identify the ways in which each individual can help you (e.g. on technical issues, strategic matters, problem solving, giving feedback, employee issues, budget planning, career development, etc.)*

Mentor	In What Ways Can He / She Help Me?
1.	
2.	
3.	
4.	
5.	

### How to Identify Good Mentors

Everyone needs mentoring from time to time. Just as your employees come to you for help and coaching, having a key list of individuals whom *you* can call upon for guidance when you need support is always helpful.

Your organization may have a more formal arrangement and method for assigning a mentor. Even so, you do not need a formal appointment or person assigned to you in order to receive mentoring. Rather, a good mentor can be anyone who you feel can:

- Relate to your challenges
- Offer an outside perspective
- Provide new ways of thinking
- Help solve a specific problem
- Enhance your ideas
- Challenge your opinions
- Give you critical and constructive feedback
- Provide you with career coaching and advice
- Act as a trusted confidant, when needed

While your own supervisor should be able to provide this sort of support, many times you need to obtain an unbiased opinion or outside view on a given situation. There is no rush to find a mentor, so be patient with this aspect of your new role. More importantly, identify names of individuals who you feel can truly assist you and are willing to give you genuine input, advice and feedback. Finally, keep in mind that mentors can be both internal *and* external to your organization.

## **Good Things Take Time: Final Words of Wisdom to Guide Your Way...**

1. It's not a race. Take it one day at a time. We all make mistakes, learn from yours.
2. Listen more, speak less.
3. With each employee, there is a relationship. Good or bad is up to you.
4. You are the moral compass for your organization.
5. Treat every commitment you make, big or small, with equal importance.
6. Your job as the boss is to help your people be at their best.
7. People are busy. Respect the time of others.
8. The greatest managers know how to convert the individual talents of their employees into high performance that deliver results.
9. If *everything* is important, then nothing really is.
10. Great leaders are willing to empower and defer to others.
11. Giving feedback is not the same as being a mentor.
12. Always seek ways in which you can turn "We can't because..." into "We can if...".
13. Asking people to work harder is not a solution.
14. Focus on strong relationships. If relationships are untrusting and fractured, no amount of motivation or employment perks will get the organization performing to its full potential.
15. Do it now, thank yourself later.
16. Peoples' happiness at work rests heavily on your shoulders. Go out of your way to make their work fulfilling, rewarding, engaging and enjoyable every day. In return, they'll naturally deliver the best results they can.
17. Continuously strive for clean, tidy, efficient and predicable execution.
18. Employee engagement starts by giving people something to believe in.
19. You don't need to have all the answers. Just help find solutions.
20. You will have good days, you will have bad days. Shrug off the losses, highlight the wins. Focus on incremental progress.
21. Your employees are real people, with real lives and real problems... just like you are a real person, with a real life and real problems.



What Is the Development Objective	Ex. To improve my comfort speaking to larger audiences	What Activities Do I Need to Undertake to Achieve This?	1. Practice in front of smaller groups. 2. Better preparation before the presentation.	What Support, Help or Resources Do I Need to Be Successful?	Take some formal training in public speaking to improve my skills and comfort level.	What Are the Measures of Success?	Feeling comfortable presenting to an audience of 50 people.	When Do I Intend to Achieve this Objective?	By the end of June