WORKBOOK: NEW MANAGER TRAINING

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Table of Contents

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Workbook Overview

The **Workbook: New Manager Training** is designed to complement the new manager training course and provide practical tools, exercises, and reflection prompts to help new managers apply key concepts to their daily roles. This workbook guides managers through essential skills such as setting goals, building relationships, managing teams, and giving feedback. By engaging with the workbook, managers will develop a deeper understanding of their responsibilities and be better equipped to lead their teams effectively.

Through self-assessments, real-world exercises, and actionable templates, managers will be able to reflect on their leadership style, set team goals, handle conflicts, and foster a positive team environment.

Learning Objectives:

By completing this workbook, new managers will be able to:

1. **Identify and clarify the key responsibilities** of a manager, including setting goals, managing performance, and fostering team development.

2. **Adopt a managerial presence** that inspires trust, confidence, and respect among team members.

3. **Set clear, measurable team goals** aligned with organizational objectives, and communicate these goals effectively to team members.

4. **Lead productive team meetings** by creating structured agendas, facilitating discussions, and ensuring actionable outcomes.

5. **Foster positive relationships** with team members through active listening, empathy, and effective communication.

6. **Manage conflicts and disagreements** constructively by applying conflict resolution strategies and maintaining a positive team dynamic.

7. **Provide balanced, constructive feedback** that reinforces strengths and identifies areas for improvement.

8. **Apply the GROW coaching model** to help employees achieve personal and professional goals through structured coaching sessions.

9. **Develop a personal leadership style** by reflecting on your progress, identifying strengths and areas for growth, and setting actionable goals for continued leadership development.

Introduction

A Manager's Role

The Big Picture

Managers play an essential role in every business. Start this lesson by helping new managers understand that the main function of their new position is to develop the heart and soul of your company: its people.

Consider the following questions:

Reflection Questions:
- What does being a manager mean to you?

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- How do you think your role as a manager differs from your previous role?

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A Manager's Role

At the heart of effective management lies the responsibility to **support, guide, and inspire** your team. A manager is not just a supervisor but a **leader** who empowers individuals to reach their full potential. Your role is to create an environment where your team feels valued, motivated, and equipped to succeed. By doing so, you not only drive your team to achieve company goals but also foster growth, collaboration, and a shared sense of purpose.

Ultimately, the most successful managers are those who **bring out the very best** in their people, unlocking talents and strengths, while aligning their efforts with the broader objectives of the organization. In this course, you'll learn how to embrace this role and set your team—and yourself—up for lasting success.

A High-Level Summary of Responsibilities

1. Support, guide, develop, coach, and motivate employees.
2. Establish team roles and delegate tasks.
3. Create goals, set performance standards, and measure progress—providing both corrective and reinforcing feedback.
4. Coordinate projects, resources, and timelines.
5. Create team systems, tools, and processes.
6. Remove roadblocks or bottlenecks for your team.
7. Facilitate effective communication between team members and serve as a liaison between upper management, other departments, and your team.
8. Create a respectful, safe, and inspiring work environment that empowers employees to do their best work.

Notice a Theme?
After reviewing the responsibilities above, do you notice a theme?
While individual contributors focus on **their own** development and performance, managers support the development and performance of **their entire team.**

Making the Shift
This distinction is critical, and the skills that make you effective as individual contributors won't necessarily make them effective as managers. Let's explore additional changes to expect from this transition.

Managers	Individual Contributors
• Deliver impact by developing and supporting **people**	• Deliver impact by building mastery and contributing **expertise**
• Oversee the **broader vision** and team performance	• Oversee the **day-to-day details** and self-performance
• Demonstrate strong **interpersonal skills**	• Demonstrate strong **technical skills**
• Focus on **strategy, planning**, and **facilitation**	• Focus on task and project **execution**

Exercise:
- **Identify Key Responsibilities**: List 3 key responsibilities of a manager that you will focus on in your role.

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Develop Your Personal Leadership Plan

This Personal Leadership Plan outlines your leadership style, key responsibilities, and how you plan to support your team. Use this template to reflect on your approach as a manager and set actionable goals for your leadership journey.

1. Leadership Style
Describe your leadership style.

Do you lean toward transformational, servant, or another style of leadership?

How do you plan to inspire and lead your team?

2. Key Responsibilities
Identify your key responsibilities as a manager.

Consider areas like setting goals, managing team performance, fostering professional development, and creating a positive work environment.

3. Team Support Plan
Describe how you plan to support your team members.

Consider communication strategies, providing feedback, coaching, and resolving conflicts.

4. Leadership Development Goals
Set 2-3 personal leadership development goals.

What areas do you want to grow in?

What actions will you take to become a more effective leader?

In the next lesson, learn how to adopt a managerial presence that inspires the confidence, respect, and commitment of your team.

Adopting a Managerial Presence

What Is a Managerial Presence?

Adopting a **managerial presence** means consistently showing up at work in a way that inspires **trust, confidence, commitment, and respect** from your employees. It's about projecting authority while remaining approachable and modeling the behavior and professionalism you expect from your team. This presence is not just about what you say, but how you carry yourself, how you listen, and how you respond to challenges and opportunities.

A strong managerial presence establishes your credibility as a leader. It helps employees feel secure in their roles, knowing that their manager is capable, supportive, and aligned with both team and company goals. When employees trust and respect you, they are more likely to be engaged, motivated, and committed to their work.

For new managers, **success is often tied to how well they project this presence**. Developing a managerial presence requires self-awareness, emotional intelligence, and a deep understanding of the needs and dynamics of your team. By embodying these traits, you'll create an environment where your team feels empowered to perform at their best.

Reflection Questions:

- How would you describe the managerial presence you want to project?

- How do you think your body language and communication style impact your team's perception of you?

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Here are examples of each of the different kinds of managers.

The Calm Problem-Solver

A project has hit a major roadblock, and the team is starting to feel overwhelmed. Rather than showing frustration, a manager with a strong presence remains calm and solution-focused, guiding the team through the issue. This calm demeanor signals to the team that challenges are part of the process and can be managed with thoughtful action, building their confidence in both the manager and the team's ability to succeed.

The Consistent Communicator

During a team meeting, a manager consistently communicates expectations, progress, and updates in a clear and respectful manner. By ensuring everyone is informed and valued, the manager fosters a culture of transparency and trust. Team members know what to expect and feel confident in their direction, which enhances their commitment to their goals and to the manager's leadership.

The Supportive Mentor

An employee is struggling with a new task. Instead of criticizing their performance, the manager takes the opportunity to coach them through the process, providing guidance and encouragement. This approach demonstrates the manager's investment in their employees' growth, inspiring loyalty and a willingness to take on new challenges. It also shows that the manager is approachable and committed to development, key components of a strong managerial presence.

The Lead-by-Example Professional

In a high-stress environment, the manager maintains professionalism by showing up on time, staying focused, and respecting the company's values and policies. Their behavior sets the standard for the team, showing that they practice what they preach. This example not only commands respect but also inspires employees to uphold the same standards, aligning the team's actions with the organization's broader goals.

The Big Idea

If you want others to follow your lead, you need to **act like a leader**. This means consistently embodying the qualities you want your team to emulate—whether it's confidence, accountability, or professionalism. Your actions set the tone for your team's behavior and their level of trust in your leadership. When you act like a leader, you create a sense of direction and purpose, inspiring others to follow with commitment and respect. Leadership is as much about presence as it is about action, and your team will look to you as the example they should follow.

How to Act Like a Leader

Be Consistent and Reliable
- Show up prepared and on time for meetings and commitments.
- Follow through on promises and decisions.
- Consistency builds trust, and reliability earns respect.

Communicate with Clarity and Purpose
- Speak clearly and confidently, whether giving instructions or offering feedback.
- Be transparent in your expectations and decisions.
- Effective communication ensures alignment and strengthens your credibility as a leader.

Lead by Example
- Model the behavior you expect from your team—whether it's work ethic, professionalism, or collaboration.
- Demonstrate the values of the organization in your daily actions.
- When employees see you practicing what you preach, they're more likely to follow your lead.

Show Empathy and Understanding
- Take the time to listen to your team's concerns and challenges.
- Show genuine care for their well-being, both personally and professionally.
- Empathy builds strong relationships and creates a culture of trust and mutual respect.

Exercise:

Observe and Reflect: Leadership Presence

Over the next week, observe how your team reacts to your leadership style. Write down any patterns or behaviors you notice and reflect on how you can improve your presence.

1. Observations
Note any specific reactions, patterns, or behaviors from your team as they respond to your leadership.

2. Reflections
Reflect on your observations. What did you notice? How can you improve your leadership presence to better inspire confidence, trust, and respect from your team?

3. Action Steps
Based on your reflections, outline 2-3 actions you will take to improve your leadership presence over the next month.

Summary

This process interaction has highlighted the key principles for adopting a managerial presence that inspires trust, respect, and credibility among team members. Here are the core takeaways:

1. **Act Like a Leader**: Your actions set the tone for the team. Be consistent, reliable, and aligned with the values of your organization. Your leadership presence shapes how others view and follow you.

2. **Key Behaviors for Success**:

    o   **Consistency and Reliability**: Always show up prepared, follow through on commitments, and maintain consistency to build trust.

    o   **Clear Communication**: Speak with clarity and purpose, ensuring your team understands your expectations and decisions.

- - **Lead by Example**: Model the behavior you expect from your team. By demonstrating professionalism and work ethic, you set a standard they can follow.
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  - **Empathy and Understanding**: Listening and caring about your team's well-being fosters a strong bond of trust and mutual respect.
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3. **Adaptability**: Throughout this process, you are encouraged to continuously review, edit, delete, or add content based on your unique managerial experience and team needs. Flexibility and responsiveness to team dynamics will help you build and sustain a strong leadership presence.

By internalizing these principles, you'll project a presence that reinforces your role as a leader, cultivates loyalty, and drives your team toward success.

As a leader, it's a major responsibility on your shoulders to practice the behavior you want others to follow. Himanshu Bhatia

Presence Audit Checklist

Use this checklist to evaluate your tone, body language, and communication in various situations. Consider how each element affects your team's perception of you as a leader.

1. Tone of Voice
Evaluate the tone you use in different situations. Is it calm, confident, and clear? Do you adjust your tone based on the situation or audience?

2. Body Language
Assess your body language during meetings, conversations, and presentations. Are you open and approachable? Do your gestures and posture align with your message?

3. Communication Clarity

Consider how clearly you communicate. Are your instructions and expectations easy to understand? Do you listen actively and respond thoughtfully?

Notes and Observations

Use the space below to jot down observations or areas for improvement in your leadership presence.

This course is designed to help you be more effective in your role as a manager. In the next section, you'll receive training for leading your team's day-to-day activities.

Leading Day-to-Day Activities

Setting and Communicating Team Goals

The Importance of Clear Goals

Setting and communicating clear goals is essential for driving team performance and ensuring alignment with organizational objectives. Clear goals provide direction, create focus, and enhance accountability. They help teams understand what success looks like, foster collaboration, and promote a sense of shared purpose. Without clear goals, teams may lack motivation, struggle with priorities, and fail to achieve desired outcomes.

Reflection Questions:

What are your top 3 priorities for your team over the next 6 months?

How will you communicate these goals to your team in a way that motivates them?

Let's explore the key benefits of setting and communicating clear goals:

Provides Direction
- Clear goals act as a roadmap, guiding teams toward a common objective.
- They help employees prioritize tasks and resources, ensuring everyone is aligned with the same destination.

Enhances Focus
- Teams with clear goals can focus their efforts on high-impact activities.
- This focus reduces distractions, increases efficiency, and drives measurable progress.

Boosts Accountability
Clear goals create shared understanding, helping to prevent potential conflict When goals are communicated clearly, team members know what's expected of them.
- Accountability grows as individuals understand their roles in achieving specific targets.

Fosters Collaboration and Motivation
- Clear goals encourage teamwork and collaboration by creating a shared sense of purpose.
- Employees are more motivated when they know their efforts contribute directly to a bigger picture.

What Makes a Goal Effective?

Effective goals are **SMART goals**—an acronym that stands for Specific, Measurable, Attainable, Relevant, and Time-Bound. SMART goals provide a clear structure for setting objectives that are achievable and aligned with organizational priorities. Invite new managers to explore what each letter in the SMART acronym stands for below.

S—Specific
- **Description**: A specific goal clearly defines what is to be achieved, leaving no room for ambiguity. It answers the "who, what, where, when, and why" questions.
- **Example**: Instead of saying "Improve customer service," a specific goal would be "Increase customer satisfaction ratings by 10% in the next six months through staff training and revised service protocols."

M—Measurable
- **Description**: Measurable goals allow you to track progress and determine when the goal has been achieved. They include clear criteria for measuring success.
- **Example**: "Reduce production costs by 15% over the next quarter by optimizing supply chain processes and reducing waste."

A—Attainable
- **Description**: An attainable goal is realistic and achievable given the resources, time, and skills available. While challenging, it should be within reach.
- **Example**: "Train five new team members on the company's project management software by the end of the month."

R—Relevant
- **Description**: Relevant goals are aligned with broader business objectives and hold significance for the team or organization. They ensure that efforts contribute to overall success.
- **Example**: "Launch a marketing campaign that targets our new customer demographic, which aligns with our strategy to expand into new markets."

T—Time-Bound
- **Description**: Time-bound goals have a clear deadline or timeframe for completion. This urgency drives focus and ensures accountability.
- **Example**: "Complete the website redesign by December 1st to coincide with the company's product launch."

How Do I Develop Goals?

As the SMART acronym outlines, effective goals are **relevant**—they align with your company's larger, organizational objectives. When developing team goals, it's essential for managers to ensure that the goals directly contribute to the broader mission and strategy of the organization. This relevance creates a sense of purpose, helping employees understand how their efforts impact the company's overall success.

To develop relevant goals:

1. **Understand Organizational Objectives**: Familiarize yourself with your company's vision, mission, and strategic priorities. Ask yourself, "How can my team's efforts support these larger goals?"

2. **Link Team Contributions to the Bigger Picture**: Identify how your team's specific tasks, skills, and responsibilities can drive the company's objectives forward. This creates a clear connection between daily work and organizational success.

3. **Consult with Leadership**: Regularly communicate with senior leaders to ensure that your goals are in alignment with any shifts in the company's focus or priorities.

4. **Set Cascading Goals**: Create goals that naturally flow from high-level organizational objectives down to team and individual performance targets. This ensures that everyone is working toward a common purpose.

By developing goals that are tied to the company's overarching goals, managers not only provide clarity for their teams but also ensure that their work contributes meaningfully to the organization's success. Follow these steps to successfully develop goals.

Step 1 – Understand the Big Picture
- Begin by understanding your company's overall objectives. What are the organization's key priorities, and how can your team contribute to these goals?
- Consult with leadership to gain insight into strategic goals and ensure alignment with your team's efforts.

Step 2 – Identify Team Goals
- Once you have clarity on organizational objectives, work with your team to identify specific goals that contribute to these larger aims.
- Use the SMART criteria to ensure your goals are Specific, Measurable, Attainable, Relevant, and Time-Bound.
- For example, if the company aims to improve customer satisfaction, your team's goal might be to reduce customer response times by 20% within six months.

Step 3 – Break Down Goals into Action Plans
- Break larger team goals into individual tasks or smaller objectives that can be assigned to team members.
- Ensure each task has clear deadlines, responsibilities, and outcomes that contribute to the overall team goal.
- For example, if the goal is to improve response times, an action plan might include tasking certain team members with streamlining workflows or implementing new tools.

Step 4 – Assign Responsibilities and Track Progress
- Clearly assign each team member their respective tasks, making sure everyone understands their role in achieving the goal.
- Regularly check in on progress through meetings or one-on-ones to ensure that tasks are on track and to provide guidance as needed.

Step 5 – Adjust and Refine
- Be open to adjusting the goals or action plans based on feedback, shifting priorities, or unforeseen challenges.
- Celebrate milestones along the way to keep the team motivated, and ensure continuous alignment with the company's evolving objectives.

Exercise:
- **SMART Goals Activity**: Write 2-3 SMART goals for your team. Ensure each goal is specific, measurable, attainable, relevant, and time-bound.

Collaborative Goal-Setting

While managers ultimately have the final say in setting goals, the goal-setting process is most effective when viewed as a **collaborative dialogue**. Engaging your team in discussions about goals not only increases buy-in but also helps surface valuable insights and ideas from those who are closest to the work. Collaboration encourages employees to take ownership of the goals and fosters a sense of shared responsibility for achieving them. By involving your team in this process, you create a more motivated and aligned group, driving both individual and collective success.

Goal Communication Checklist for Managers

Effective managers communicate goals in a way that is clear, concise, and inspiring. Use this checklist to ensure your goal communication addresses key points that will motivate your team and promote ownership:

State the Goal Clearly:
Ensure the goal is specific and easy to understand.
Avoid jargon or overly complex language.

Explain the Why:
Provide context by explaining how the goal aligns with the company's broader objectives.
Help employees understand the purpose behind the goal and its importance.

Define Success:
Clarify what success looks like, including measurable outcomes.
Ensure everyone knows how progress will be tracked and evaluated.

Break Down Responsibilities:
Clearly outline individual roles in achieving the goal.
Make sure each person knows what is expected of them and how their work contributes to the larger objective.

Set Timelines:
Provide a clear timeline for when the goal should be completed.
Include milestones or checkpoints to monitor prog

Hold Your Team Accountable
Setting team goals is only half the equation; the other half is ensuring follow-through. As a manager, it's your responsibility to help your team stay on track by regularly tracking progress and scheduling reviews. Accountability keeps everyone focused and ensures that goals are consistently moving toward completion.

Here are key ways to hold your team accountable:

- Track Progress: Regularly check in with team members to assess their progress on assigned tasks. Use measurable indicators to ensure that the team is moving toward the goal.

- Schedule Regular Reviews: Establish periodic reviews or one-on-one meetings to discuss progress, address challenges, and make adjustments if necessary. This keeps the goal front-of-mind and creates opportunities for ongoing support.

- Provide Constructive Feedback: Offer feedback on what's working well and where improvements can be made. Reinforce that accountability is a shared commitment to success, not just a way to point out mistakes.

- Celebrate Milestones: Acknowledge when team members reach key milestones. Celebrating progress boosts morale and motivates the team to continue pushing toward the end goal.

By actively helping employees stay accountable, you increase the likelihood of success and ensure that goals are achieved in a timely and effective manner.

Goal-Setting Worksheet
Use this template to outline team goals and break them into actionable steps for each team member. Ensure each goal is clear, measurable, and aligned with the team's overall objectives.

1. Team Goal
Describe the overall team goal. Ensure the goal is specific, measurable, attainable, relevant, and time-bound (SMART).

2. Key Milestones
List the key milestones that will help the team achieve this goal. Each milestone should be a significant step toward completing the overall objective.

3. Action Steps for Each Team Member
Outline the specific tasks or responsibilities assigned to each team member. Be sure to clarify the expected outcome and timeline for each action step.

4. Monitoring Progress
Describe how you will track progress toward the goal. Include any tools, check-ins, or performance metrics that will be used to measure success.

5. Deadlines and Timelines
List the deadlines for each key milestone and action step. Ensure that all deadlines are realistic and aligned with the team's objectives.

Additional Notes

Use the space below to jot down any additional notes or reflections about the goal-setting process.

You can communicate goals and track progress regularly in team meetings. The next lesson provides tips for leading team meetings effectively.

Leading Effective Team Meetings

Unproductive meetings waste time and resources—and exasperate attendees. In this lesson, learn how to facilitate meetings that stay on track, encourage equal participation, and drive projects forward.

Should I Call a Meeting?
Before scheduling a meeting, managers should ask themselves: **"Is a meeting the best way to achieve my goal?"** or **"Is there another medium of communication or collaboration that would produce the same results?"**

Reflection:
How do you currently prepare for and run meetings?

What steps can you take to make your meetings more effective?

Effective Meetings

To help managers make this decision, invite learners to explore the following topics:

Define the Purpose
Meetings are best suited for discussing topics that are:
- Ask yourself: "What is the specific purpose of the meeting?"
- If the goal is to gather feedback, share detailed updates, or discuss something that requires back-and-forth conversation, a meeting may be necessary.
- **Example**: A brainstorming session or a discussion on project roadblocks may require live interaction.

Explore Alternative Mediums
- Could an email, chat message, or shared document achieve the same result?
- For straightforward updates or quick questions, an email or collaborative tool (like Google Docs) might be more efficient.

- **Example**: Sending a progress update or distributing task assignments via email could save time and avoid meeting overload.

Assess the Urgency
- Is there a time-sensitive decision that needs live discussion, or can the matter wait?
- If a decision can be made asynchronously, consider using a project management tool where team members can contribute at their own pace.
- **Example**: Team members can add comments to a shared document rather than attending a meeting to review a report.

Consider the Attendees
- Who needs to be part of the conversation? If only a few people are involved, a meeting might not be necessary.
- Evaluate whether the subject matter affects the whole team or just a select few.
- **Example**: A one-on-one check-in or a focused email thread with relevant people might be more effective than pulling the entire team into a meeting.

Evaluate the Value of Real-Time Interaction
- Would real-time interaction add significant value to the discussion?
- If immediate feedback, clarification, or brainstorming is needed, a meeting could be valuable. Otherwise, async communication could suffice.
- **Example**: A meeting may be essential for resolving complex disagreements or discussing sensitive topics.

"Meetings must be deliberate and intentional—your organizational rhythm should value purpose over habit and effectiveness over efficiency." Chris Fussel

Meeting Checklist

As a meeting facilitator, it's your responsibility to ensure that meetings are productive, focused, and efficient. Use this checklist to guide you in preparing and conducting your meetings:

1. **Define the Purpose**
   o Be clear on why the meeting is being held. What's the primary goal?
   o Ensure every meeting has a specific agenda that addresses key points.

2. **Prepare an Agenda**
   o Distribute a clear, concise agenda to all participants in advance.
   o Include time allocations for each discussion topic to keep the meeting on track.

3. **Invite the Right People**
   o Only invite team members who are essential to the discussion.
   o Ensure each attendee understands their role in the meeting.

4. **Set Clear Expectations**
   o Communicate the expected outcomes of the meeting upfront.

- Make sure participants know what decisions need to be made or actions taken by the end of the meeting.

5. **Encourage Participation**
   - Foster an open and collaborative environment where all voices are heard.
   - Ensure quieter team members have a chance to contribute.

6. **Manage Time Effectively**
   - Start and end the meeting on time.
   - Keep discussions focused and avoid getting off track. If a topic requires more time, schedule a follow-up or assign it for further discussion.

7. **Summarize and Clarify Next Steps**
   - Conclude the meeting by summarizing key takeaways, decisions made, and action items.
   - Assign responsibilities and set deadlines for each action item.

8. **Follow Up**
   - After the meeting, send a brief summary or minutes to all attendees.
   - Include a list of action items, responsible parties, and deadlines to ensure accountability.

Common Meeting Challenges—and Facilitation Techniques to Overcome Them
Improve managers' ability to engage participants, create a productive environment, and achieve meeting objectives with the help of these facilitation techniques. Invite managers to expand the rows below to learn specific strategies for overcoming the most common challenges in meetings.

How do I encourage equal participation?
Whether you're dealing with an overzealous meeting attendee—or a wallflower—here are some techniques for balancing participation in meetings:
- **Go around the table.** This technique is ideal for encouraging participation from quiet employees—or preventing a single team member from dominating the conversation. After asking the group a question, collect responses by going around the table and having every team member share something.
- **Ask open-ended questions.** Use open-ended questions to either increase or balance participation. For example, you could ask: "What else?" or "What do you think?" or "Who else has something to add?" or "What are your thoughts from X perspective?"
- **Break into groups.** Consider assigning pairs or small "breakout" groups to give team members time to work through more involved prompts or activities. Smaller groups are easier for participation and can give employees space, time, and support for developing their ideas.

What do I do if people talk over one another?
When multiple team members want to speak at once, establish who will speak first, second, third, and so on. If possible, write down the speaker order somewhere that the group can see, and

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add a checkmark next to each name after a speaker has had their turn. This process is known as speaker stacking.

What should I do if the discussion gets off track?
If an employee makes a point that isn't relevant to the issue at hand, acknowledge and record it, then set it aside for now. You might say, "That's a good point, but I'm not sure it's relevant to the objectives of this meeting. Let's table it for another time." You aren't ignoring the employee's ideas, but you're also staying on track and moving forward.

What do I do if we get stuck talking in circles?
When your team gets stuck talking in circles without committing to specific decisions, solutions, or plans, you need to intervene. If that happens, you might:
- **Encourage decision-making with visual aids.** Use visual aids such as whiteboards or flip charts for capturing ideas, summarizing outcomes, or bringing closure to decisions or action items. Visual aids can help you keep the group aligned and signal when to move to the next agenda item.
- **Reframe and refocus.** Another technique is to reframe and refocus the conversation with a specific prompt, such as, "What are the next steps?" "Where did we land?" "How can we keep moving forward?" Or, "What's our final decision here?"

How do I solicit ideas from team members?
Quickly generate ideas with a team brainstorm. Give your team a prompt and have them shout out ideas as fast as possible. Set the expectation that no idea is a bad idea in a brainstorm. Record ideas where everyone can access them.

How can I create a safe space for discussing sensitive topics?
Agree on **ground rules** to guide team interactions. Having ground rules can foster a respectful environment that encourages participation or invites team members to voice disagreements constructively.

Some examples of ground rules include: "Consider and respect others' opinions," and, "Give everyone an opportunity to speak." You might even agree on signals team members can use when they have something they'd like to add without disrupting the person speaking.

What do I do if the meeting is taking too long?
A drawn-out meeting isn't just frustrating, it also lowers productivity. Manage the clock with the help of these tips:
- **Create a "no-rehash rule."** A "no-rehash rule" prevents your team from repeating previous points. If an item has already been addressed, say, "No rehashing," and encourage others to do the same. That will help call out counterproductive behavior.
- **Give a time limit.** If your team is struggling to reach an agreement, give them a certain amount of time to decide. If a decision can't be reached after that time limit, assign independent work and defer the topic until the next meeting.

Exercise:
- **Run a Mock Meeting**: Plan and execute a meeting with a small group or peers. Record the meeting and evaluate the effectiveness using a checklist provided.

Meeting Effectiveness Checklist

Use this checklist to evaluate the effectiveness of your mock meeting. Assess each category to determine what worked well and areas for improvement.

1. Clear Agenda
Was the meeting agenda clear and communicated ahead of time?

2. Time Management
Was the meeting conducted within the allotted time?

3. Participation
Did all participants have an opportunity to contribute?

4. Clarity of Communication
Were key points communicated clearly and concisely?

5. Focus on Objectives
Did the meeting stay focused on the goals and objectives?

6. Action Items
Were clear action items and next steps established?

7. Follow-Up Plan
Was there a plan for following up on action items or goals?

Meeting Agenda Template
Use this template to organize your next team meeting. Ensure that each section is clearly defined and communicated to participants in advance.

1. Meeting Details

Date:
Time:
Location:
Attendees:

2. Meeting Purpose
State the purpose and objectives of the meeting.

3. Key Discussion Points
List the main topics or points that will be discussed during the meeting.

4. Goals
Define the goals or outcomes that should be achieved by the end of the meeting.

5. Action Items
Record any action items or decisions that were made during the meeting.

6. Next Steps
Outline the follow-up actions, responsibilities, and deadlines.

Many meetings end by summarizing or assigning action items. The next lesson explores when and how to delegate tasks as a manager.

Delegating Tasks

Delegation is a powerful tool for managers, as it allows them to **divide** a larger project into manageable tasks and **conquer** the workload by assigning each team member their own piece.

Why Is Delegation Important?

Delegation is a powerful tool for managers, as it allows them to **divide** a larger project into manageable tasks and **conquer** the workload by assigning each team member their own piece. This approach not only distributes responsibility but also leverages the team's individual strengths. By clearly defining roles and responsibilities, delegation ensures that every part of the project gets the attention it needs while empowering employees to take ownership of their tasks.

Effective delegation promotes teamwork, increases productivity, and helps managers focus on high-priority responsibilities while enabling team members to grow in their roles.

Delegation is critical because it **improves team efficiency and productivity** by distributing tasks across team members based on their skills and strengths. When a manager delegates effectively, it ensures that work is completed faster and more efficiently, as each person can focus on the tasks they're best equipped to handle.

Additionally, delegation fosters **skill development and growth** within the team. By giving employees new responsibilities, managers help them develop their capabilities, build confidence, and prepare for future leadership roles.

Delegation also allows managers to focus on **higher-level strategic responsibilities** rather than being bogged down with every detail of a project. This focus on the big picture enables better decision-making and leadership, ultimately driving the team and organization forward.
In short, delegation is essential for creating a **well-balanced, high-performing team** where everyone is contributing to shared goals while also growing in their own roles.

By delegating tasks, you empower your entire team to take on new responsibilities, which encourages them to **grow** as individuals and **move upward** in their careers. Delegation not only distributes the workload but also provides opportunities for team members to develop their skills, gain confidence, and take ownership of important tasks. This creates a more engaged, capable, and motivated team, where everyone is contributing to both individual and collective success. As a manager, effective delegation helps you nurture the potential of your team, fostering growth and preparing them for future challenges.

What and How to Delegate

New managers can explore the tabs below to dive into the details of what and how to delegate effectively.

What to Delegate
Use this tab to provide managers with examples of tasks they should delegate versus team members. This includes tasks like scheduling meetings, data entry, or creating reports.
- **Development Opportunities**: Delegate tasks that can help employees grow professionally, such as leading a small project or conducting research.
- **Specialized Tasks**: If someone on your team has specialized skills (e.g., graphic design or data analysis), delegate tasks that align with their expertise.

What Not to Delegate
- **Critical Decisions**: Do not delegate tasks that require major decision-making or have significant consequences for the company.
- **Confidential Tasks**: Tasks involving sensitive information, like performance reviews or salary decisions, should be handled by you.
- **Complex Strategic Planning**: Long-term planning or high-level strategy decisions are part of your role as a manager and should not be delegated.

How to Delegate Effectively
- **Choose the Right Person**: Assign tasks based on individual strengths, skills, and current workload. Make sure the person you delegate to is capable and available to handle the task.
- **Provide Clear Instructions**: Be specific about what needs to be done, the deadline, and any key details. Provide context to ensure your team understands the bigger picture.
- **Set Expectations and Support**: Clarify what success looks like and be available to answer questions or provide guidance along the way. Let your team know you're there to support them.
- **Trust but Verify**: While it's important to trust your team, check in regularly to monitor progress. Offer feedback and assistance when needed to keep things on track.

Ask managers to use their discretion when determining which tasks need their attention. Then, encourage them to provide their team members with the information and resources they need to succeed.

The Bottom Line
Think of a manager's role like that of a **music conductor**. Just as a conductor doesn't play every instrument in the orchestra, a manager doesn't need to handle every task personally. Instead, the conductor chooses the music, interprets its meaning, and directs the musicians to bring it to life. Similarly, a manager's job is to set the vision, assign tasks, and guide the team toward achieving their goals in harmony.

By delegating tasks, much like a conductor assigns parts to different sections of the orchestra, a manager can focus on the bigger picture—ensuring each team member contributes to a unified, productive outcome. The success of the team lies not in doing it all yourself, but in helping each individual play their part to the best of their ability, creating something greater together.

Module Exercise: Delegating Tasks Effectively

Objective:
Practice identifying tasks that can be delegated, choosing the right person for each task, and providing clear instructions.

Instructions:
1. **Identify a Task**: Choose a task that you are currently responsible for but could be delegated to someone else on your team.

2. **Choose the Right Person**: Consider the skills, experience, and current workload of your team members. Who would be the best fit for this task? Write down why you chose this person.

3. **Provide Clear Instructions**: Write out step-by-step instructions that you would give to the person you're delegating the task to. Ensure the expectations, timeline, and resources needed are clear.

4. **Follow-Up Plan**: Write down how you plan to monitor the progress of the task and provide support if needed. Also, note how and when you will check in with the team member.

Reflection Questions:
1. What tasks are you currently doing that could be delegated to someone else?
2. How do you determine which tasks are appropriate for delegation?
3. What qualities do you look for in a team member when delegating tasks?
4. How do you provide instructions when delegating to ensure the task is completed as expected?
5. What follow-up processes do you have in place to ensure tasks are completed successfully?

Delegating Tasks Effectively: Task Delegation Template

Use this template to help you delegate tasks effectively by identifying the task, choosing the right team member, providing clear instructions, and establishing a follow-up plan.

1. Task to Delegate
Describe the task you are delegating. Include the main responsibilities, goals, and expected outcomes.

2. Selected Team Member
Write the name of the team member you've selected to take on this task. Explain why you chose this person based on their skills, experience, or availability.

3. Instructions for the Task
Provide clear and detailed instructions for the task. Include specific steps, deadlines, and any resources needed to complete the task.

4. Follow-Up and Check-Ins
Describe how and when you will check in on the progress of the task. Include any milestones or checkpoints to ensure the task stays on track.

5. Feedback and Support Plan
Outline how you will provide feedback during and after the task completion. Include any support or resources the team member might need along the way.

Even after delegating tasks, it's still a manager's responsibility to support employees with what they need to succeed. The next section focuses on how to create a team environment that enables members to thrive.