New Leader Checklist

YOUR FIRST LEADERSHIP JOB

How Catalyst Leaders Bring Out the Best in Others

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Introduction

BECOMING THE VERY BEST FIRST-TIME LEADER

Congratulations! You’re now in charge. Perhaps it’s your first time as a leader, or maybe you want to fine-tune your skills. Either way, you’ve begun one of the most rewarding chapters of your career. But, like many beginnings, the first few years can be challenging. Fortunately, you don’t have to tackle this challenge on your own. *Your First Leadership Job* gives you practical advice straight from others who have walked in your shoes. Not only does it include dozens of tools to ensure your success, it’s also based on the authors’ and DDI’s extensive experience and research, which ultimately have led to the development of millions of leaders around the world. In fact, a quarter-million leaders will be developed this year alone via DDI training.

*Your First Leadership Job* is divided into two sections. Part 1 introduces the concept of catalyst leader—one who sparks energy, passion, and commitment in others. Your transition to catalyst leader is a major step in your leadership journey. This book provides essential tips to put you on the catalyst path. Ultimately, leadership is about the many conversations—frequent, clear, authentic, and occasionally difficult—that you will have daily. *Your First Leadership Job* builds awareness of the fundamental skills you’ll come to rely on to make every one of these interactions successful.

Part 2 devotes 13 chapters to critical core leadership competencies, including coaching for success, hiring the best employees, turning dreaded appraisals into discussions that propel performance, and handling difficult employees. It also includes a chapter for first-time female leaders.

Look at *Your First Leadership Job* as an indispensable companion to becoming an awesome leader—one who will make a positive, lasting impact on your team, family, and career. Visit www.YourFirstLeadershipJob.com to learn more.
During the coming months you’ll want to learn the ropes quickly to rapidly maximize your contributions. Yet, any new transition comes with new things to learn (or unlearn), along with new processes and procedures to follow now that you’re in a new role. To minimize your frustrations as a new leader, we have created a comprehensive checklist of activities for the next six months.

As you review the list, you’ll notice that there are some basic categories of activities:

- **Administrative**—These are the tactical details aligned with the office space, payroll structure, HR policies, and performance management systems.

- **Training and Development**—Knowledge in this area will ensure that you and your team have the tools you need to perform your job. This might include learning hiring processes and a system to develop your team as well as self-diagnosis to focus on your own development.

- **Social**—The focus here is on the social environment at the office, or what some would call the culture of your team, and the broader company. This aspect of a leadership transition is critical and often overlooked. The connections you form within and beyond your team form a network and enable effective teamwork.
• **Business- and Results-Focused**—These activities will help you understand the business, the priorities for your team, and what it takes to deliver results to your internal and external customers.

The checklist is designed to be a user-friendly, month-by-month guide to navigating your first six months on the job. Many leaders find it helpful to set aside a specific time each month to reflect on progress made from the previous month and plan ahead. If this works for you, block an hour on the first of every month to assess your progress.

The checklist is also segmented into three categories that will aid you as you plan your actions:

**Tasks you will do with your manager**

**Tasks you will do with your team**

**Tasks you will accomplish on your own**

These guideposts should help you plan your leadership “first steps” for the next six months. And, speaking of six months, the list is divided into three, two-month time periods because it’s impossible to attempt everything at once. The timing is heuristic, based on wisdom from hundreds of thousands of first-time leaders who said in hindsight, *I wish I had known to “learn this,” “do that,” or “talk to others” when I first got started*. It’s inevitable that tasks will slip back a month or two. No worries, just make sure you’re making progress.

And, you’re not alone. You’re on a journey supported by your family, friends, colleagues, boss, and your organization. We used the word “journey” purposely. Because, as opposed to “taking take a trip” or “traveling overseas,” you’re on a leadership journey. And if you use this checklist, it’s a journey for which you’ve prepared and on which you’ll grow. Why? Because the word “journey” alludes to some type of discovery resulting in a change. We know you’ll be different when you reach your destination.

And this is what we expect of you. No doubt, your mind-set and, in turn, your behavior will change. As a result of acting on the tasks and skills you’ve learned in this book, you’ll be thinking and doing things differently. You’ll be the best version of you as a leader.

**So, let’s get started.**
YOU AND YOUR MANAGER

With your manager, clarify your new job and their expectations of you.

- Job description.
- Expectations and what you’re being held accountable for in the next 3, 6, and 12 months.
- Scope/limit of decision-making authority.
- When to involve your manager.
- What additional areas you may now become involved in.
- Percentage of time to be spent on leadership activities versus project management (coach versus player).
- How you fit into the larger picture.

(Use the “What Do I Need to Know” tool from Chapter 3 to interview your boss regarding expectations for you in this role.)

Seek to understand the business.

- Talk to your manager (and other managers) to determine what makes your area productive and growing.
- What are your organization’s one-, three-, and five-year plans? How does your group support these?
- Understand how your team fits into the bigger picture (if you’re new or weren’t 100 percent clear as an individual contributor). Understand what occurs in work flow up and downstream from your team/department.
- Seek to understand what is top of mind for senior leaders (e.g., listen to a quarterly earnings call).
- Understand your organization’s current key strategic priorities.
- Explore how you and your team add value (the access to information and vantage point of some information is different now—formerly an individual contributor versus now a leader—there’s a difference in how you’ll support the key priorities).
- Understand financials and the importance of them to your business.
Prepare yourself to manage former peers who are now direct reports.
- Discuss with your boss how to handle former peers (see tips in Chapter 5).

Leverage your network via your manager.
- Ask your manager to be a connector within your purposeful network strategy.

Share the team’s small, medium, and large successes with your manager.

YOU AND YOUR TEAM

Prepare yourself to manage former peers who are now direct reports.
- Discuss with your boss how to handle former peers (see tips in Chapter 5).

Explore the team’s unwritten rules if you are joining an intact team.
- Determine who can help you explore these quickly.

Establish your approach to team meetings.
- Determine if you’ll make changes from the current meeting process—frequency, format, and structure.

Create or update the team charter.
- Do you need to create one or modify the current one?
- Discuss and gain agreement with your team on:
  - Purpose
  - Goals
  - Commitment
  - Trust
  - Processes
  - Communication
  - Boundaries
  - Rules of the road
  - Results—make visible each month to track progress
Create a one-pager about yourself to share with your team members. This will speed on-boarding.

• Many executives use one-pagers as they transition into a new organization. They allow you to share your style, approach, expectations (e.g., do you require a 20-page report or an executive summary), and personality enablers/derailers. This approach helps the team understand you on a different level than through your resume and your reputation. Overall, it also helps to build trust very early on, and it jump-starts a productive, effective transition into the team.

• There's no one right way to craft your one-pager, but some items might include:
  – Your work styles and habits (e.g., like to work late).
  – How you like to work best (e.g., 24-hour turnaround on emails, executive summary versus full reporting).
  – A bit about yourself personally—bio.
  – Your expectations.
  – How you like to be kept informed.
  – Relationships.

Meet with each team member one-on-one and get to know your team:

• Get to know the members—what are their interests, strengths, skills?

• Understand their roles—how do they like to work?

• What has worked well for them on previous teams?

• How are they feeling about you?

• What can you do to continue to support them?

What advice would you give to a colleague who is pursuing a leadership position for the first time?

'I would say, “Assess your team very quickly before you even think about the bigger tasks you want to achieve to make sure you have all of your tools ready before you start with the work.”

—UK finance leader, building products company
Focus on your team’s development.

- Review each team member’s past/current performance plans and long-term development plans.
- Adjust as necessary.

Celebrate and reinforce small, medium, and large successes with the team.

YOU

Create a networking strategy.

- Determine who is/should be in your network now. Who will help you move through the ambiguity of your role and get things done?
- Reach out to network contacts and directly ask for their support.
- See tip in Chapter 19.

Establish a feedback mechanism and make it part of your ongoing routine.

- How can you get feedback on your leadership skills from your direct reports? Your manager? Your mentor (see “Seek out a coach/mentor in your organization” on the next page)?
- Target one person from your network for the first six months.
- See the importance of receptivity to feedback in Chapter 5.

(IF new to your organization) Learn about the company’s performance management system.

- What process, including timing, is used? What forms are required?
- How do you navigate the system, if online?
- What are the expectations for the manager and team members around the system?
- How do priorities cascade from your manager down to you, and, in turn, from you down to your team?
MONTHS 1 TO 2

☐ Get up to speed on formal HR processes.

• Meet with HR to understand policies, systems, ethics, and guidelines for employees (e.g., time off, vacations, harassment).
• Begin to understand other HR processes such as selection, managing poor performance, making job movement/status changes, documenting personnel moves (e.g., Personnel Action Form), and compensation (i.e., ranges, timing, and process for increases).

☐ Seek out a coach/mentor in your organization.

• An outside perspective, from someone who is not your boss, can be invaluable. The individual can be within your organization, your function, or sit in a different department.
• Research on mentoring suggests that when asked, other leaders will say yes! So, don’t be afraid to reach out and ask.
• This person would:
  – Serve as professional role model.
  – Examine new ways of thinking.
  – Explore and discuss ideas and issues within a confidential environment.
  – Provide constructive feedback/reinforce effective performance.
  – Recommend learning opportunities.

☐ Join or create an affinity group of new leaders, all working through their first leadership job together.

• Use social media or monthly lunches to lean on each other for support.
• These types of groups are:
  – A commitment to developing yourself and others.
  – An opportunity for guidance and assistance in becoming a competent leader.
  – A forum for ideas and concerns.
  – Connections with more experienced professionals who are willing to share personal experiences.
  – Sources of coaching—sometimes providing encouragement and at other times, a gentle push.
  – A way to develop deep personal and professional friendships.
MONTHS 1 TO 2

☑ Identify tasks and responsibilities you can delegate to achieve key business results and develop your team’s capabilities.
  • Identify delegation opportunities within the current work you do. Consider how much authority you wish to delegate and aspects of scope, expectations, and time constraints.
  • Match people to the task/responsibility. Consider the capabilities that individuals and/or teams need to develop.
  • Plan and communicate the strategy.
  • Provide ongoing follow-up and coaching.

☑ Sharpen your focus on execution.
  • Complete your radar chart (see Chapter 9).
  • Share with your manager.
  • Share with your team.
YOU AND YOUR MANAGER

☐ Share the team’s small, medium, and large successes with your manager.

☐ Focus on your leadership gaps and build from there.

  • **Step 1:** Complete a skills self-assessment:

    Whether you’re an experienced leader or just getting started, you can hone your skills and knowledge in all areas of leadership. These areas can be categorized into seven Leadership Imperatives. Rank your current skill in each one by numbering them from 1 (most skilled) to 7 (least skilled):

    ______  Coach and Manage Performance
    ______  Manage Change
    ______  Build Engagement and Trust
    ______  Make Decisions and Drive Results
    ______  Influence, Network, and Partner
    ______  Inspire Innovation
    ______  Select, Develop, and Retain Talent

  • **Step 2:** Discuss your prioritization with your manager:

    – Choose 1-2 strengths to optimize as well as your personal motivations.
    – Choose 1-2 to develop.
    – Think about those that will help you use your experiences and what you’ve learned.

  • **Step 3:** Document an individual development plan:

    – Document and review with manager; discuss how progress will be monitored.

☐ Take stock of your team members, align with the key business priorities for your team over the next year, and discuss with your manager.

  • Opportunities
  • Motivations
  • Current accountabilities (e.g., projects)
  • Past performance (e.g., barriers, preferences)
• Technical knowledge/skills audit against the productivity and growth target and gaps
• Teamwork/cooperation
• Planning and organizing
• Judgment and decision making
• Strengths to leverage/development areas
• How you will develop them

YOU AND YOUR TEAM

- **Meet with team members individually.**
  - How are they feeling about you?
  - What can you do to continue to support them?

- **Focus on accountability.**
  - Identify who is accountable for each critical project/task/accountability.
  - Conduct a goal-setting discussion.

- **Identify key barriers/bottlenecks to productivity.**
  - Quantify them.
  - Work with the team and determine how to reduce or eliminate them.
  - Identify their origination point and how to reduce them early in the process.

- **Adopt a measurement focus.**
  - With your team, identify (or create) lead and lag measures for the critical projects/tasks/accounts.
    - How robust are they?
    - How visible?
    - How aligned with the business?
  - Discuss lead and lag measures with your manager, then with the team.
  - Set up reporting mechanisms.

- **Celebrate and reinforce small, medium, and large successes with the team.**
YOU

Continue to sharpen your focus on execution.

• Revisit your radar chart (see Chapter 9).
• Share progress and insights with your manager.
• Share progress and insights with your team.

Complete a delegation recheck.

• Provide ongoing follow-up and coaching for previously delegated tasks/responsibilities.
• Further analyze tasks and responsibilities you can delegate.

Focus on your customers.

• Identify your top internal and external customers.
• Determine what it takes to delight them.
• Meet with key customers and learn about your relationship. Investigate whether they’re using your products and services as well as their expectations for the future.

Identify barriers to effective team dynamics.

• Identify sources/triggers.
• Isolate or reduce sources/triggers.
• Keep a count of occurrences by month.
YOU AND YOUR MANAGER

- Share the team’s small, medium, and large successes with your manager.
- Analyze your group’s status via a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis.
  - Consider your team’s strengths, weaknesses, opportunities, and threats.
  - Draft a list and share with your manager.
- Update your development and performance plan and engage in a midyear progress check with your manager.
  - Schedule a visioning session with your team and invite your manager to attend. As a group, conduct a SWOT analysis.
  - Develop solutions/ideas that help to mitigate risks.

YOU AND YOUR TEAM

- Meet with team members individually.
  - How are they feeling about you?
  - What can you do to continue supporting them?
- Ask team for feedback on your skills.
  - Coaching
  - Delegating
  - Developing others
  - Setting performance goals
- Analyze customer complaint data with your team.
  - Review and categorize internal and external complaints.
  - Determine how to address current issues.
  - Draft a plan to prevent future issues.
You and Your Team

MONTHS 5 TO 6

- **Analyze your internal partnerships and networks.**
  - Determine which relationships can be classified as strong or weak for your team.
  - Work with your team to improve the weak working relationships and determine how to build or maintain strong relationships.

- **Conduct a progress check for the team’s performance and values alignment, comparing month six to month one.**

- **Discuss five factors (process, trust, communication, commitment, results) affecting team performance; agree on plans to improve.**

- **Celebrate and reinforce small, medium, and large successes with the team.**

**YOU**

- **Complete a delegation recheck.**
  - Provide ongoing follow-up and coaching for previously delegated tasks/responsibilities.
  - Further analyze tasks and responsibilities you can delegate.

- **Define how you’ll continue to balance your new role.**
  - Unfortunately, it is a myth that when you become a leader your time will be focused on leading and that you’ll no longer serve as a functional expert (e.g., marketing leader versus marketing practitioner).
  - Our advice: learn to be a leader but continue to stay current in your functional area.
  - Seek advice from peers in your cohort group.

- **Assess how effectively you’re spending your time (using past two calendars).**
  - Are you being too reactive?
  - Are you doing too much of the team’s job yourself?