

# New Manager Guide

The insight you need to succeed



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**New managers have a lot on their plate. A new job, sometimes a new company. A team to meet, learn the quirks of, and get up to speed on. Sometimes they've never managed employees before. This can be overwhelming which is why new managers need solid ground to start on to set themselves up for success.**

**In this special report, we've collected the best of Business Management Daily's advice for new managers from checklists to 30/60/90 day plans. Whether you're a small business, Fortune 500 company, in-person, remote, or hybrid — we've got the insight you need.**

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# New manager checklist — set yourself up for success

Congratulations! You have reached a career milestone by landing your first managerial position. At this exciting time, you're likely intrigued by the possibilities, eager to get off on the right foot, and battling a few (or a truckload of) nerves.

Butterflies are par for the course. After all, you want to prove to yourself and others that you deserve this increased responsibility. And, while you have probably gone above and beyond as an individual contributor, you realize that leading others to success is a whole new ballgame. —

Stay courageous; each new manager eventually gets into a groove. To make charting your course easier, take a look at this new manager checklist:

## Understand the organization and your role in it

Whether you have a history with your employer or are brand new, taking on a managerial position necessitates thorough familiarity with the company's operations and mission. You cannot adequately lead people to greater heights without knowing the organization's core values and primary objectives.

- **Gain clarity about your position.** Your boss or human resources should provide a detailed job description with a list of responsibilities before your start date.
- **Learn about organizational structure.** Who do you report to? Who is in charge of what? Figuring out these things early on helps avoid stepping on toes and provides information on where to turn for assistance on particular issues.
- **Figure out the most pressing concerns for the company and for your individual team.** You cannot possibly tackle every problem immediately, so learn what to prioritize. Maybe, for instance, perfecting communication and time management among a hybrid staff currently needs the most attention, but strategizing on a new social media campaign can wait a bit.

**Introduce yourself to everyone, and learn what people do.** Becoming comfortable with other managers keeps you in the loop and expands your network. You may even find a mentor to help you navigate your new role. Don't forget to interact with support staff, too. You will be amazed how kindness toward a secretary or maintenance worker can pay off and enhance your reputation.

## **Meet with team members**

Building rapport involves learning about your direct charges as individuals and as a group. Start the process early on by doing the following:

- **Gather as a team.** You will get the chance to see group dynamics at work. The meeting also provides a forum to outline your goals, share a bit about yourself both personally and professionally, and express excitement about working with this group.
- **Schedule one-on-ones with individual team members.** Read each person's job description before the meeting to get a sense of his or her expected duties, but be ready to go beyond what's on paper. What does the individual see as his responsibilities? What is her preferred work style? What are the major challenges of the position? What motivates the person to put forth his best? Learn things about the worker's interests and life away from the office, too.
- **Pay attention to remote employees.** Make an effort from day one to include them. Invite telecommuters to Zoom in to staff meetings. Set up a separate video chat or phone call to speak with each personally.

## **Circulate**

Few actions prove as eye-opening to a new manager as getting away from the computer screen and out into the main workspace. Things to do as you make your way through this area include:

- **Simply observe**, making a point to stay as far away from preconceived notions as possible. What is the layout of the office? What are people doing? How do they interact with one another?
- **Ask questions**. People take pride in sharing their expertise. What do workers have to say about their tasks and how they are done?
- **Evaluate the vibe**. You can learn a great deal about company culture and employee engagement by considering the general mood. Is the place eerily silent? Does it buzz with excitement? Do workers appear stressed out?
- **Engage in random chats**. Your presence may lead some employees to spontaneously strike up a conversation. Go with the flow.

## **Figure out what you need to learn**

Yes, your ascension into this position likely developed from your knowledge and strengths. Succeeding here rests on identifying things you don't know in order to fill in gaps.

- Get up to speed as quickly as possible on the company's technology, which serves as the modern means of communicating and managing work. Know how to share documents. Become a pro at the project management system. Learn how to set up video conferences and chat with remote staff.
- Everyone has potential weaknesses. Can you identify yours? Maybe you know the industry well but lack a background in managerial responsibilities such as motivating individuals or promoting teamwork.
- Based on your self-evaluation, think about how to go about improving areas where you find yourself lacking. Seminars, books, and TED talks may be useful for acquiring new skills, especially soft ones. Get suggestions from members of your network or fellow leaders at your company.

## **Embrace a new mindset**

Before moving into a management role, your focus was on succeeding as an individual contributor. Now, you'll be judged by the achievements of your team.

- **Reflect on teams you have been a part of in the past.** What specific things made them operate well? What factors caused problems?
- **Think about what it means to be a leader.** What characteristics have good managers from your past displayed?
- **Realize that your responsibilities have changed.** You are now in the unfamiliar position of accountability to people both below and above you in the organization. How will you juggle the interests of your team with those of upper management?
- **Avoid the impulse to jump in immediately to fix things or do it yourself when individuals struggle.** Rather, remember that you are now more interested in employee growth and skill development. Put into practice the old adage, “Give a man a fish and you feed him for a day. Teach a man to fish and you feed him for a lifetime.”

## **Earn people’s trust**

Undoubtedly, direct reports will be curious about your leadership style. The actions you take during that critical first day, first week, or even first month impact how others perceive you. These early impressions can be difficult to alter, so it pays to make them as positive as possible.

Put a particular emphasis on building trust. Morale and productivity soar when people feel respected and believe you have their best interests at heart.

### **Actions that encourage trust include:**

- **Keep your word.** Failing to carry through on promises or threats at this stage spells disaster. Team members will think you merely “talk big” and won’t take what you say seriously going forward. A good way to keep this in check is to avoid overpromising or overreacting.
- **Act as a good role model.** You look like a hypocrite for scolding others when they arrive late but regularly don’t show up on time yourself. Display the behaviors and attitudes you wish to see in others.
- **Avoid micromanaging.** Nobody enjoys a new manager peering over her shoulder. Such excess projects the vibe that you do not consider the

individual competent and are waiting for failure. Instead, check in with team members regularly, and encourage them to seek you out as needed.

- **Admit mistakes.** Do not expect others to own up to their errors if you can't assume responsibility for yours. Work to create a culture of accountability where people learn from what they do wrong.
- **Ask for feedback.** Seeking constructive criticism sends the message that you value the opinions of others. It promotes the idea that everyone has a voice that should be heard.
- **Recognize and appreciate others.** Workers want to trust that you notice what they do, especially when they go above and beyond their job description.
- **Share credit.** Others will feel leery to put forth their best work again if they feel slighted. Spread the glory!
- **Never play favorites.** Trust diminishes when a manager fails to hold everyone to the same standards. Even if you are friends with some colleagues from the days before becoming a manager, remain fair and impartial.
- **Maintain an open door.** Display a willingness to discuss any subject team members have on their minds. You'll gain a reputation as a leader who hears people out and thoughtfully addresses concerns.

## **Complete your onboarding**

If new to the company, human resources likely provided you an onboarding checklist. Don't let these vital activities fall through the cracks while you are busy adapting to your new position.

- **Fill out all appropriate paperwork in a timely manner.** Completion ensures you receive your paycheck, insurance, and other benefits without delay.
- **Take manager training modules and reading material seriously.** They are a reflection of what the company considers valuable for you to know.
- **Review the employee handbook.** Even if you are a current employee moving up to management and not requiring as much of an onboarding



process, now is a great time to revisit the document. Read the handbook with “managerial” eyes. You’ll refresh your memory about company policies on issues likely to arise, such as dress code, absenteeism, and progressive discipline.

## **Take time to recharge**

Finally, remember that any new job proves challenging at the beginning. All new hires worry about making a positive first impression and learning the ropes. Add onto this the stress of now being not only a new employee but also a manager for the first time, and you have a recipe for some sleepless nights.

As admirable as it is to want to dive full throttle into your new role, don’t do so at the expense of your well-being. Do not think of caring for yourself as a luxury. Rather, consider it critical for obtaining the energy necessary to perform your best as a team leader. To that end:

- Eat a healthy lunch.
- Use time off on evenings and weekends to enjoy some non-work activities that make you feel good.
- Exercise. Taking a walk proves particularly helpful to both the body and the mind.
- Unplug from electronics well before bedtime to promote peaceful slumber.

## **Your first 30 days as a new manager — starting on the right foot**

Getting a new job is an exciting time, especially when it’s a new leadership role. However, it’s also a busy time. Once you’ve completed your onboarding paperwork and updated your LinkedIn, there’s a ton of additional work to do as you transition into your new role. The first 30 days as a new manager is an important time. Managers need to work hard to make a positive first impression and build trust with their new teams during the first month.

There's also a lot to learn beyond just the basic job duties. Managers not only need to learn how to do their jobs but they also need to gain a clear understanding of the company and the jobs of each of their direct reports. It can be a lot to take in. To help, we've compiled a guide to the most important things to prioritize during the first 30 days as a new manager.

## **Set goals and create a plan**

As a new manager, you'll have a lot to learn and accomplish within the first 30 days, and even the first 90 days. It's best to go in with a clear plan and set some goals for yourself. If you don't have a supervisor or onboarding manager providing you with a 30-60-90 day plan, start building one for yourself.

If you're assigned a mentor or onboarding manager, they can be a great resource for setting goals and building your roadmap for the first 30 days. It can also help to meet with your manager to clarify their expectations for the new manager role and for the progress that you should make in the first 30 days. Some leaders expect new managers to hit the ground running, while others anticipate slower ramp-ups.

## **Get to know the company**

Managers play an important role in upholding the company's values and contributing to its culture. As such, new managers need to work to get to know the company well. This includes learning about the company policies, mission, strategic goals, and communication strategies.

### **Familiarize yourself with the company's culture**

One of the most common mistakes that new managers make in the first 30 days is diving into their new role without taking the time to learn the culture of the company and their department. Slow down, ask some questions, and do a bit of people-watching. Pay attention to how other managers interact with their teams and how team members interact with one another.

How people within the organization communicate with one another is a key aspect of a company's culture, so pay close attention to the interactions around you.

During the first 30 days, prioritize listening rather than constantly speaking. It will be a smoother transition for yourself and your new team if you make an effort to mesh your own personality and leadership approach with the established culture of the organization and team.

### **Read the employee handbook**

Technically every new employee should be reading the company handbook during their first week, but many new hires skim through it fairly quickly. Managers should dedicate a bit more time to the required reading. They need to know the company policies well enough to properly model and enforce them while also acting as a resource for other employees who have questions in the future.

New managers should do a thorough review of all of the company's key employee policies during the first 30 days and reach out to human resources or other company leadership with any questions. Knowing the policies will help new managers learn more about the company, their role as a manager in this organization, and how to best support their teams.

### **Review the company's mission and values**

Reading the organization's mission statement and company values is a great way to learn more about the company and its desired culture. A company's mission statement describes the core purpose of the organization. It details what the business does and what it hopes to accomplish. This may include offering superior products, making products more accessible or affordable to customers, providing better customer service, making sustainable products, or otherwise offering something that is particularly helpful to customers or benefits others.

The company's values are the core principles, beliefs, and values that the organization's culture is built on. Managers have a special responsibility to familiarize themselves with these values and model them to employees. A lot of managers like to weave company values or the mission into team meetings either as reminders or by connecting current projects or tasks to the larger mission of the business.

## **Explore the company's strategic plan**

Your new team's goals and activities should connect to the business's overall strategic goals. In order to properly understand those connections and drive success for your team, it is important to review the company's strategic plan and any annual strategic goals. Review what the company hopes to achieve for the year and how the work of your new team will contribute to those goals.

## **Learn the internal processes and technology**

A large portion of the first couple weeks in any new job is typically spent learning the company and the department's internal processes and workplace tools. There may be new software to learn, new project management processes, time-tracking procedures, and differences in the standard operating procedures for common work tasks.

## **Meet with other leaders**

New managers will also want to start getting to know other leaders in the company in the first 30 days. These other managers can be excellent resources for learning more about the company and navigating internal challenges. Managers also need to work a bit harder at networking than individual contributors as they often spend most of their days with direct reports rather than peers and thus don't get to have the same casual social interactions and work friendships that other team members get to build.

## **Get to know the team**

Getting to know your new team and building trust with that team is essential during the first 30 days as a new manager. Here are some of the approaches to consider when trying to get to know your new team.

## **Hold an introductory team meeting**

Having regular team meetings is a great way to get to know everyone better and improve communication in the department. Hopefully, the prior manager was

holding weekly or at least regular team meetings, but even if they weren't it's a good idea to introduce team meetings as part of your transition process.

Team meeting time can be split between checking in on projects and conducting team-building activities. If you're able to, provide an agenda and invitation that matches up with the time and format of the team's existing team meeting process. Be prepared to answer some questions from employees. As much as you need to get to know them, they need to get to know you too.

Take this as an opportunity to start building trust and initiate transparent communication. If the last manager exited unexpectedly, employees may feel a bit shaken up. Provide transparent updates to the team on what this first month will look like for them as well and encourage team members to come to you with any problems or concerns that pop up during the transition process.

### **Schedule 1:1s**

One of the most important things for new managers to prioritize in the first 30 days is to individually meet with each of their direct reports. Relying solely on team meetings and day-to-day communications is a common mistake that new managers make. Group meetings and communications are one way to get to know your team and the overall culture of your department, but 1:1s are essential for getting to know each employee.

To get the most out of each meeting, new managers should review each employee's file before meeting with them. Some of the most useful resources are past employee reviews and the employee's quarterly or annual goals. These documents can help new managers understand the employee's strengths, areas of improvement, career goals, and current personal goals.

During each initial one-on-one meeting, new managers have several things to accomplish. First, it's a good opportunity to check in on what each person is working on. The new manager should inquire about ongoing projects or initiatives and review the recurring duties of each team member. In addition, it's a good time to check in with each team member about their goals and concerns. It's normal for employees to feel uneasy during periods of change, so use this meeting to listen to

their concerns, address any fears, and discuss what things will look like moving forward.

## **Learn the job**

Like with any job, the first month of a new role involves a lot of training to help you learn the job.

### **Complete required job training**

In some cases, new managers may be able to receive some on-the-job training or guidance from the outgoing manager. In others, there may be another trainer assigned to help you acclimate to your new job duties. Take your time with any assigned on-the-job training, orientations, or e-learning opportunities. Managers need to be very knowledgeable about the company's internal offerings as well as their products or services, so don't be afraid to ask questions.

One thing that can help you down the road is to go through the training and try to look at it from an entry-level employee's perspective. What questions would they ask? If you wouldn't know how to fully answer them, ask your trainer the question. As a manager, you not only need to understand the processes or concepts but should also be prepared to teach them to employees later on. If you aren't sure how you'd properly articulate something, ask and see how the trainer explains it.

### **Review prior meeting minutes**

If your new team or the leadership team takes meeting minutes or records their meetings, new managers should take the time to review the last one to learn how to lead or participate in them. See what the current priorities and initiatives are. This is a great way to see where the prior manager left off and get a feel for how the meetings usually go so that you can run them in a way that feels familiar to the existing team. In the absence of meeting minutes or notes, look for past agendas or a list of pending action items. If the team is remote or hybrid, check if the prior manager recorded the meetings on Zoom or Teams.

## **Develop your leadership skills**

Both first-time managers and experienced managers should take some time to think about their leadership styles during the first 30 days in a new role. A new job is a great time to reevaluate the type of leader that you want to be and what leadership skills you may need to work on. Don't feel like you need to fully adopt the leadership style of the previous manager or other leaders within the organization, but do try to adapt some of your approaches to better fit the new organization's culture.

A new manager role is also a great time to evaluate your current leadership skills and look into leadership training opportunities. Your new organization may offer leadership training or some form of e-learning or continuing education stipend to help.

### **Find a mentor**

The first 30 days in a new leadership role is also a good time to consider finding a mentor. First-time managers can benefit greatly from partnering with a mentor to obtain guidance as they adjust to their first manager role, develop their leadership style and skills, and navigate challenges with their new team. Mentors are often senior leaders within the company though new managers can also seek mentors outside of the organization as well. Some people find mentors through professional organizations or alumni networks.

Experienced managers coming from another organization may already have an established mentor. However, they still may want to look for internal mentorship opportunities to learn and seek guidance from someone who knows the ins and outs of their new organization.

### **Communicate your leadership style**

In addition to solidifying your leadership approach personally, it's a good idea to talk to the new team about your leadership style and preferences. Let them know your communication preferences, whether you want them to always come to you with issues or whether you're alright with some independent problem-solving, how you would like to keep track of their work, and anything else that seems relevant.

## **Solicit Feedback**

Towards the end of your first 30 days as a new manager, collect some feedback from both supervisors and employees. It generally takes at least 90 days to fully get onboard and up to speed in a new role, so don't be discouraged if there's still some work to be done or room for improvement after 30 days. Solicit feedback from your direct manager, leadership peers, other stakeholders, and even your team.

It can be a bit awkward to directly ask for feedback from direct reports, and they may be hesitant to provide criticism, so feel free to get creative with the approach. You can solicit feedback anonymously through a team survey or comment box. You can also frame it as a department-wide feedback cycle. What has been working for them overall and what would they like to see changed? This is a good way to further familiarize yourself with the operations of the team and company, as there may be issues impacting employees or outdated processes that you haven't caught on to yet. Getting the team involved and taking the time to listen to them is another great way to build trust as you move forward in your new role beyond the first 30 days.

## **8 tips for new managers to start on the right foot**

Advancing into a management role is an exciting but nerve-wracking experience. Managers have a huge responsibility when it comes to motivating and supporting their teams to reach their full potential. Many people get their first managerial job in a small business or start-up with a limited (or nonexistent) new manager training program. That can make it difficult to build the new skills necessary to become a great leader.

Fortunately, there is also a lot you can practice on your own to develop your leadership skills. Where there are countless things to learn as you ascend into management, these 8 tips can help guide you through the early stages of management.



## **Get comfortable delegating**

One thing that can be challenging when moving from an individual contributor role to a managerial position is learning how to delegate. As a new manager, you may feel as though you need to be involved in everything that your team is doing.

However, if you have a strong team with diverse skills, delegating allows you to make the best use of your time and get the work done as efficiently and effectively as possible. As a new manager, it's best to familiarize yourself with your team. Learn their individual skill sets and strengths to understand how to delegate and assign tasks.

Learning how to let go of tasks and delegate them also shows that you trust your team. As a new manager, there will likely be some trial and error when it comes to learning how to strike the proper balance between supporting your team and not micromanaging them. In your first couple of weeks, pay attention to each team member's work style. Some people like to be left alone to complete their work while others need more frequent check-ins.

## **Practice giving meaningful feedback**

Being able to deliver constructive and meaningful feedback to employees is an essential management skill. Offering feedback to employees can feel odd at first, but it's good to get into the habit of delivering frequent and specific feedback. Don't let your comments pile up until it's time for performance reviews. Delivering feedback on an ongoing basis helps your employees grow and improve in their roles more effectively. It also ensures that the work they produce meets your expectations.

Delivering positive feedback often feels less intimidating to new managers, so feel free to start there. Try to find one piece of positive, yet meaningful, feedback to deliver to each employee each work day.

Positive feedback is most meaningful when it highlights what you like about their work. Instead of saying something generic like "good job", try to compliment a

specific thing that they did well. This is more memorable and it also demonstrates what you'd like to see from them in the future. This is important when you're a new manager, as it helps set expectations for employees in a positive manner.

Once you get comfortable with positive feedback, start incorporating more constructive criticism. This should highlight areas where there is an opportunity for improvement. Keep your tone upbeat. This feedback is meant to help them do better, not to simply be critical. Let them know that you're on their side.

There are situations where a more stern approach is warranted. However, it is important to realize that the employees are still adjusting to you as their new manager and may not even fully understand how you want things down. Be empathetic to that and make feedback a two-way process.

## **Build trust with your new team**

One of the most important things that a new manager can do is start building trust with their team immediately. Getting off on the right foot with communication and trust-building will make your transition into management much easier.

So how do you build trust? One of the most important things that you as a manager can do to build trust and develop positive working relationships with your new team is to initiate transparent communication. The transition phase is actually a great time to start doing this. Provide updates to your team on what's going on, any changes being made to the department, and how your new role as their manager will impact them. Be open to answering questions and be honest when you don't have all of the answers. Employees like to see that you're being open with them.

You can also make it clear that you're there to help. Create an open door policy and be supportive when employees do come to you for assistance.

## **Learn how to listen**

Most people believe that they know how to listen well. However, most people can also name a long list of managers, coworkers, or loved ones that don't seem to

really listen. Don't become that manager that makes their employees feel ignored. Learn how to practice active listening with your team.

Active listening involves demonstrating to the other party that you are listening. Some ways to show that you are listening include nodding, smiling, and using reflective statements to summarize or clarify what the other party has said. (i.e Use open body language to convey that you are listening and not closed off to what they are saying.

Try to let your employees speak without interrupting or redirecting the conversation. Managers sometimes communicate in a rushed or pressured manner because they are busy and have a lot of items to prioritize. However, cutting off employees or rushing the conversation is off-putting and can make employees feel undervalued.

## **Find a mentor**

New managers will want to consider finding a mentor to help them navigate the challenges that come with being a first-time manager. Mentors will often be more senior leaders within the organization. However, new managers can also seek mentors outside of the organization as well.

Mentors are a great resource for learning how to handle employee issues and build your leadership skill set.

Mentors can also give you an outlet when you need to talk through an issue or vent. One challenge with moving into a management role is losing your peer support network. Non-managerial employees have a large number of peers whom they can ask for help or vent about workplace frustrations to. However, managers tend to have fewer peers and may not spend much time actually interacting with other similar-level managers. Having someone to talk through issues with can improve your problem-solving and relieve stress.

## **Learn to say no**

Effective leaders need to know when and how to say no, and they need to be able to stick with their decisions amidst pressure from others. New managers often find themselves being pushed around by others because they are not yet confident in saying no.

New managers often have trouble saying no to their employees. This is especially true when new managers have advanced within the organization. When a manager is promoted from within, they may have direct reports that are former peers. This can make it harder for the new manager to stand their ground and say no when necessary. If you are in this situation, use that prior experience as an advantage.

You understand your employees' experiences since you've previously been in their shoes. You can use this to look for compromises and alternative solutions where possible. However, there will still be occasions when you need to firmly decline a request. The best way to approach this is to say no in a confident manner. You can provide an explanation, but make it clear that your decision has been made.

One other important aspect of leadership that new managers also need to get comfortable with is saying no to other managers or higher level leaders. As a manager, it is your job to protect your team and their time. If a higher-up or another department requests something of your team that they don't have the bandwidth for, you will need to be the one to step up and say no. This doesn't always have to be a firm no. In many cases, you may just need to reject the requested time frame or deadline. In other cases, you may need to reject the task altogether if it is outside the scope of your employees' duties. Learning to say no in this capacity prevents your team from experiencing burnout or unrealistic expectations.

## **Refine your leadership style**

One of the most challenging aspects of being a first-time manager is refining your own leadership style. Developing your leadership approach and figuring out how to make it fit into your company's culture takes time and practice.

One great thing to keep in mind is that it is okay for your management style to differ from other leaders in the company. Many new managers try to emulate the manager whose role they are filling in order to provide consistency for the team. This does make sense, but don't be afraid to make your leadership style your own. After all, innovation and growth is sparked by people that are willing to try new approaches.

As you adapt to your new role, take some time to think about how you are approaching leadership and how you would like to lead. The first several weeks in a new job are often focused on learning and getting up to speed, but as you progress as a manager it's important to start refining your approach to leadership. Do some honest self assessments and consider what you may want to do differently or improve upon in order to become a better manager.

## **Expand your DEI knowledge**

Everyone in the workplace should do their best to be respectful of people with different backgrounds, beliefs, and ability statuses. However, managers have an even bigger responsibility when it comes to promoting diversity, equity, and inclusion (DEI) in the workplace.

Managers need to gain a basic understanding of the legal aspects of DEI. This can include major laws such as the Americans With Disabilities Act and the Civil Rights Act of 1964 as well as the basic principles of harassment and discrimination prevention. There is manager training available on sexual harassment that includes additional knowledge beyond the standard employee version that most workplaces will provide. Reviewing your company policies and handbook can also help with the compliance aspect of DEI.

However, good managers go beyond the legal basics and educate themselves on real-world DEI issues. A practical way to do this is to set aside a reasonable amount of time each week, maybe even 15 minutes to start if your schedule is packed to read about current DEI issues. You may also want to consider taking an online course through LinkedIn or another platform to learn more about inclusion and

issues like implicit bias in order to ensure that you are approaching leadership in an equitable manner.

## **Examples of a 30 60 90-day plan for new managers**

From the moment the job interview ended and the hiring manager offered her the managerial position, Jennifer could not wait to begin her new role. Her new team looked promising, and she was eager to implement her ideas on how to improve the department. Ready to hit the ground running, she envisioned making a great first impression on everybody encountered.

Instead, Jennifer often arrived home frustrated and exhausted. Some team members seemed unhappy with a procedural change she made her first week. Paperwork piled up, from budgets needing review to onboarding forms requiring completion. HR kept sending reminders to finish those managerial training modules. She had intended to get to those later on Thursday, but the staff meeting ran long (despite not even touching the last three items on her agenda). Then, there was that issue with the project management system. She assumed it would operate like the one at her last company. She quickly found out it didn't — after three different people mentioned her errors.

Overwhelmed and unsure of herself, she often wished she had a roadmap to provide direction.

### **Creating a 30-60-90-day plan**

As all new hires will attest, those first weeks on the job pose a challenge. New managers like Jennifer face an extra obstacle. They know others look to them as leaders, but it is hard to guide when you have not yet mastered the lay of the land.

A great way to handle the situation is to formulate what is known as a 30-60-90-day action plan. As the name suggests, its contents cover the first 90 days on a new job.

This amount of time corresponds to the three-month grace period/probation time employers commonly provide for new employees to get up to speed and establish themselves. A 90-day plan template contains three main sections. Each part focuses on goals and activities for a specific period: the first month (30 days), the second month (60 days on the job), and the third month (90 days of employment).

Formulating such a document helps people in a new position become better time managers. The writer looks at the bigger picture and prioritizes what needs to be done when. Laying out a concrete vision of specific, measurable, and realistic goals offers a sense of control. Accomplishing the stated milestones boosts motivation and confidence.

Some individuals taking on a new manager role will find their employer requires such a plan. Human resources may provide a 30-60-90-day template to guide the process and perhaps a plan example or two. Those looking for ideas often find going over their job description helpful.

Whether your new company asks for a 30-60-90-day plan or you create one on your own, show it to your supervisor. He or she can offer valuable input as well as reassurance that you are on the right track. While every person's end product will look different, the following provides some guidance on constructing a 30-60-90 plan. Be certain to start each section with the actual dates covered (such as July 15-August 15) for easy reference.

## **The first 30 days of the plan**

The initial month of employment is a time filled with handling the basics. Do what is needed to get up to speed, and set learning goals. Focus on absorbing as much information as possible about the company's mission, operations, and people.

While not as "splashy" as trying to make an immediate impact, accumulating knowledge and connections will pay off. What you learn will guide future actions and decisions. Others will view you as thoughtful, curious, and caring. You will begin to build trust and respect.

Consider including some of the following items in the 30-day section of the plan.

## **Complete onboarding**

You want to receive your paycheck, insurance, and other benefits without delay, right? Do yourself and HR a favor by filling out all appropriate paperwork in a timely manner. Likewise, schedule blocks to do manager training modules and read provided material. Pay particularly close attention to the employee handbook. Look at it both as a worker and as a manager. You will get a firm grasp of company policies on issues likely to arise, such as dress code, absenteeism, and progressive discipline.

## **Master company technology**

Effective communication and project management are difficult when you don't know how to use the tools. Familiarize yourself with everything from the get-go, such as how to share documents, what Slack channels exist, and how to set up video conferences.

## **Meet one-on-one with direct reports**

Get to know members of your team. Read each person's job description before the meeting to get a sense of his or her expected duties, but be ready to go beyond what's on paper. What does the individual see as his responsibilities? What is her preferred work style? What are the major challenges of the position? What motivates the person to put forth his best? Learn things about the worker's interests and life away from the office, too.

## **Schedule a team meeting early on**

Share a bit about yourself both personally and professionally. Express excitement about working with this group. Discuss any pertinent issues and short-term plans. Be open to what team members want to talk about.

## **Circulate**

Spend time away from your desk and out in the main work area. Listen and observe. You'll learn plenty about office operations and workflow. Evaluate the vibe.



You can find out much about company culture and employee engagement by considering the general mood. And since your presence may lead some employees to spontaneously strike up a conversation, go with the flow. Random chats build camaraderie and may bring important issues to light.

### **Connect outside your department**

Don't limit interactions to just your own team. Introduce yourself to as many people as possible, and learn what they do. Building connections with other managers will help you navigate the new company. Interact with support staff, too. Besides enhancing your reputation, rapport with administrative assistants and maintenance workers will likely prove valuable down the line.

### **Familiarize yourself with where things stand**

Gain an understanding of the nitty-gritty. What are the company's key performance metrics? Where do budgets stand? Who are the primary clients, and what services does your organization provide for them? Higher-ups likely will judge your success as a manager based on factors such as productivity figures, staying within budget, and pleasing key customers. Thus, it pays to know the indicators used.

### **Check in with your own manager**

As the end of the month draws near, get feedback on your performance so far. It will ease concerns about how you are doing. If there is a problem, you can address it quickly to right the ship. Ask about any new issues or priorities you should attend to going forward.

### **The middle 30 days of the plan**

By month two, new managers typically start feeling more comfortable. Learning continues, of course, but the basics become second nature. You know general operations, names, and likely even have pretty good insight into the personalities of your direct reports.

Building on knowledge acquired and connections made, new managers can start contributing more during days 31-60. Asking questions and listening remain important. But, at the same time, you can begin making a name for yourself by expressing your own ideas and taking measures to shape your team.

The following are some things the new manager might want to put in this section of the plan.

### **Brainstorm**

Think about what struck you during the previous period. Perhaps a certain problem kept appearing, morale seemed low, or a way of doing something seemed very inefficient. How might the company go about making improvements to these areas?

### **Analyze data**

Now that you understand the numbers, dig deeper into them. Where might budgets be trimmed or reallocated? What patterns do you notice in performance metrics?

### **Standardize**

Look for ways to save time and establish consistency by developing routines. Setting up a meeting agenda template, for instance, makes it easy to quickly create the document before each gathering and to keep content limited to the timeframe.

### **Hold one or more team meetings**

Spend some of the time covering current issues, but also look to the future. Discuss and get feedback on some of the initiatives you are considering. Work together to develop various team goals. Strategize on how to accomplish them, perhaps using the SMART goals method. (Each letter in SMART stands for an important element of successful goal-setting: Specific, Measurable, Achievable, Relevant, and Time-bound.)

### **Issue a challenge**

Motivate your team by giving them ownership over an objective. Maybe you'd like to gain five new clients this month. Encourage them to problem-solve and act together on this mission — with the promise of a pizza party if accomplished.

### **Continue to meet one-on-one with direct reports**

Checking in with individuals remains a priority. Conversations now, however, can move beyond general introductions. Help team members identify their strengths and weaknesses. Look for skill gaps and measures that can fill them in. Seek feedback on what management can do to improve productivity and company culture.

### **Implement small projects**

It still might not be the ideal time to overhaul a marketing campaign or seek funding for a new software system. However, start putting minor initiatives into action. You will gain a sense of accomplishment and start gaining a reputation as a mover and shaker. Since you showed patience by first learning the ropes and generating trust during the first month, others will likely be ready to give your ideas a try. (Jennifer from earlier might have had better luck with the staff accepting her procedural change if she had waited until this stage to put it into action.)

### **Recognize and appreciate**

Employees love to know that their manager notices what they do well. Look for opportunities to pat people on the back. Send a heartfelt email thanking someone for staying late or putting in extra effort. Pen a personal note congratulating the month's top seller. Surprise the team with bagels one morning as a thank-you for their assistance in getting you up to speed in your new managerial role.

### **Check in with your own manager again**

Discuss progress and challenges. You are still new enough that feedback on your performance will dominate much of the conversation. However, you also can start talking about future goals and plans, especially as they relate to the company's mission.

## **The last 30 days of the plan**

Get ready to shine in days 61-90! You know a great deal about the company and its people now. Bigger moves are possible and probably even expected by both direct reports and upper management. Confidently embrace putting your strong leadership skills into action.

Include items like these in the last phase of the 30-60-90-day plan.

### **Make staffing decisions**

The previous 60 days provided time to thoroughly examine your team. If you are short-handed, go full throttle on hiring and recruiting now. Likewise, put what you have learned from evaluating the staff into practice. Perhaps someone seems better suited for a different role on the team than the part he currently plays. Work on making that switch. Or, if your department is carrying a worker who is unproductive or toxic, start the termination process.

### **Put bigger ideas into action**

Draw on what you have learned during the past two months to make significant changes. Maybe this means reallocating money to build a larger budget for a project that would benefit the company's mission. Perhaps you want to try out a novel morale-building exercise. Make your move to do the things that will truly make a difference.

### **Hold one or more staff meetings**

Discuss the outcome of the team goals created last month. Also, people likely will have questions about some of the new procedures you are putting into place. Use this time to clarify, explain the reasoning behind changes, and build buy-in.

### **Keep up individual meetings with staff members**

One-on-one check-ins remain integral and will stay that way even beyond the 30-60-90 plan. But, kick your conversations up a notch this month. After issuing feedback and addressing any employee concerns, spend time talking about career

ambitions. Where does this person want to be in six months, a year, or five years? What further skills or education does she desire? What types of goals can she set to prepare for advancement? Development plans motivate workers. They also increase retention because they offer the vision of a future with the company.

### **Check in with your own manager**

Provide a summary of your probation period accomplishments, and ask for feedback. Show that you are an agent of change by presenting your thoughts for even more achievement going forward. Just as you did with your own charges this month, discuss career goals. If the 30-60-90-day plan worked as it should, you should be able to come out of this meeting feeling good about yourself and clear on what is ahead for you at this company!

## **Common traps for new managers to avoid**

Transitioning from an individual contributor to a people manager sounds straightforward. You did a great job in your particular role, and now you're being tapped for greater responsibility by joining management ranks and formally leading others. Piece of cake! Before you jump into the pool too quickly, though, it's essential to get into the appropriate mind space.

### **From solo performer to leader ... avoid micromanaging**

There's an expression that says, "What got you here won't get you there," meaning that the same skills, knowledge, and aptitudes that made you successful as a solo performer might not work well as a leader. Want proof? Micromanagers come in all shapes in sizes, and because of their intense need to control everything that comes out of their new team, they feel the need to oversee everything. I've even seen new managers who instructed their team members, "No emails are to be sent out from this department that I'm not copied on!" Ouch.

We've probably all had our share of working for micromanagers, and we likely didn't enjoy the experience all that much. After all, who wants to work for someone trying

to control your every move and thought, expecting perfection before an email can be sent from your desk, or otherwise making you feel like your sense of confidence and creativity is constantly challenged?

True, when people who report to you send out emails, recommendations, or project-related deliverables, your neck is somewhat on the line. I get that. But here are some words of wisdom as you prepare for this massive transition in terms of your individual performance and team contributions that are about to show themselves.

### **Ease the transition with these three rules**

- **Rule 1. Perfectionism is the enemy of creativity.** John Updike said that, and it perfectly underscores the challenges that many newly minted managers experience. Nothing stops the forward march of creative endeavor like the need to produce something to perfection.
- **Rule 2. Micromanagement is about uber-control, pure and simple.** Since you could “control everything” on your desk when you worked solo, you now attempt to control everything on everyone else’s desk, although you’re now responsible for a team of four. Never a good strategy because you’ll burn yourself out.
- **Rule 3. Micromanagement won’t allow you to scale your career.** If managing four people has you chasing your tail with your hair on fire, you likely won’t get a chance to manage a team of eight. Or eighty. Or eight hundred. No doubt, mastering “leadership” is the game you want to play without getting lost in the quest for perfection.

### **From control to trust**

Still, we must endure these somewhat negative experiences working for micromanagers because they teach us who we are *not*. The critical question is, how do you get beyond this need to control and towards a state of trusting those who report to you? How do you make the mental break with this concept of “individual contributor” and being recognized as a “top performer” when you’re suddenly faced with being measured by the work of others? Here are two tips.

## **Train them to do the work as you would do it**

Help your team build their confidence in what they're doing. Become a trusted mentor and coach who helps others prepare for career progression by quantifying their achievements, recognizing their successes openly, and celebrating even small wins so that people on your team feel engaged, self-motivated, and energetic. In short, what you want for yourself, give to another.

## **Consider generational differences**

Remember that Gen Y millennials (45 and under) and Gen Z Zoomers (25 and under) cherish career and professional development above all else. How can you pay it forward by helping them prepare to replace you (once you are promoted again) and gain leverage in their careers to excel and be recognized for top performance?

Keep some of these tips in mind, and you're on your way to becoming a manager your employees will respect—and follow.

# **Advice for new managers: Dos and don'ts of leadership**

Stepping into a new leadership role is an exciting time. But once you've celebrated your new role and updated your LinkedIn profile, there will also be a lot of challenges to navigate as a new manager. From building a rapport with your team to problem-solving roadblocks that spring up in your new role, being a new manager comes with a lot of new responsibilities.

Whether you're a first-time manager or just taking over as manager in a new company or department, there are a lot of things you should and should not do in this new chapter of your career. To help you navigate your new role, explore the best tips and advice for new managers below.

## **Advice for New Managers: The Dos and Don'ts of Leadership**

Here are some key things that you should and should not do as a new manager.

### **Do understand the role of a manager and cultivate your skills**

If you've just been promoted to a management role, that means you were probably doing quite well in your prior role. You have great job skills to model for your team. However, it's important to understand that being a great individual contributor doesn't automatically translate into being a great manager. Managing others requires some new skills that you may need to cultivate as you enter this new chapter of your career.

Managers act as coaches for their direct reports. It's your job to provide guidance, set strategies, and cheer your team on as they do great work and grow in their own roles. You need to create the right environment where people can come up with great ideas and feel comfortable sharing them. Make sure that as you move into your new leadership role, you're thinking about how to best provide that support and motivation for your team. It requires a bit of a shift in mindset if you're used to going to work and just focusing on your job tasks and personal career growth.

### **Do provide clarity and structure**

Sometimes new managers want to come off as "a cool boss" or "the chill boss" by taking a more laid-back management style. That in itself is perfectly fine. However, many new managers go about this the wrong way and end up creating more stress for employees. Even if you plan to take a more relaxed approach to management, it's important to provide some structure and set clear expectations for your new team.

Let your employees know what you expect from them and how you would like things done in the department. Tell them how you want them to communicate with you. Do you like emails and instant messages, or can people stop by your office with quick questions? Explain anything remote employees need to do communication-wise, such as checking in with you when they log on in the morning to verify that they're on time and online.



If you're not quite sure how to provide structure or clarity on procedural matters, ask them about the existing processes and then consider any changes that you would like. This can include how assignments are assigned and tracked or whether they need to check in with you before going on a break.

### **Do set one-on-one meetings with team members**

Dedicating time to get to know each team member individually is one of the most important tasks to focus on in your first few weeks as a new manager. Typically you'll want to have a meeting with the entire team on your first day, then get a meeting on the calendar with each direct report individually in your first couple weeks as a manager.

During the one-on-one meeting, you'll want to talk to the employee about their role and how you can best support them. It can help to review their job descriptions and any performance documents such as past performance reviews or their current performance goals to get a better feel of what they do and where they are at in their career journey. This initial check-in meeting is also a good time to encourage them to ask questions or tell you if there's something they need. They may have a questions about your leadership style, expectations, and other things.

### **Do encourage open communication**

A change in leadership is challenging for both parties. There are bound to be miscommunications, frustrations, or feelings of uncertainty. Encourage your new team to come to you with any concerns or issues that they have. Then, ensure that you are responding to them calmly and respectfully when they do speak up with any concerns. This will help you build trust with your new team and encourage continued communication.

### **Do be willing to learn from employees**

Good managers are always willing to listen and learn. Whether you're a first-time manager or a seasoned leader stepping into a new role, there will be a lot that you can learn from your employees. They know the company's culture, processes,

software tools, and their roles better than you will in the beginning, so don't be afraid to ask questions of them or solicit their feedback.

You'll want to spend your first week or two focused on learning about the team and the company overall, and your employees will be one of your best sources of knowledge. Showing that you're willing to listen to your direct reports will also go a long way in making a positive first impression and building productive working relationships.

### **Do learn to give constructive feedback**

If you're new to management, it can feel a bit odd to give feedback at first. However, employees really do want to hear your feedback, as long as it's delivered with the right approach. If you see an opportunity for an employee to improve their work, go in with a coaching mindset and give them some feedback on what they could do differently to strengthen their performance. You'll also want to continuously give feedback and acknowledge when you can tell that they have incorporated your suggestions.

### **Don't forget to provide positive recognition**

Be sure to give balanced feedback and recognize positive efforts frequently. When you're a new manager it can feel like there are a million fires to put out everywhere and it can be easy to focus on the negatives. However, you don't want to let that overshadow your team's achievements and hard work.

Positive feedback and recognition will help you build better working relationships and keep your team motivated. The [Achievers 2023 State of Employee Recognition Report](#) found that employees who receive recognition weekly are more engaged, more productive and less likely to be searching for a new job. Make a conscious effort to speak up when an employee is doing well.

### **Don't introduce changes too quickly**

Sometimes you take over a new department or come into a new organization and see that there is a lot to be done. This is especially common when you join a

start-up that is still finding its footing when it comes to practices and procedures. This can also be true when you take over a team that had the same leader for many years and has been stuck in their old ways. You may feel compelled to hit the ground running by putting new processes in place or quickly updating all of those outdated management practices, but the best advice is to slow down and prioritize.

### **Don't micromanage**

Give your employees room to make choices and decisions. You don't want to get in the habit of micromanaging each employee's day-to-day activities, and there will likely be aspects of their jobs that you're not fully knowledgeable about as you come into your new role as a manager. Therefore, it's important for employees to feel empowered in working independently and making decisions within their scope of work.

### **Don't get stuck in your ways**

Just as companies or teams may be stuck in their old ways and resistant to change, managers can be as well. If you've been a manager before and are starting a new role in a different company or department, this is a good opportunity to adjust or adapt your approach to management.

What worked with your last team may not work as well with your new team. The new company culture may also require a slightly different approach if you've changed companies. This can be especially true when switching between different types of organizations, such as going from a large corporation to a small start-up or a non-profit to a for-profit company. You'll also want to be mindful of things like regional and generational differences in communication and attitudes toward work and consider how to adapt your approach based on these differences.

When in doubt, ask for feedback. Ask your team how you can best support them, what type of communications they prefer, and what level of oversight they feel they work best with. Great leaders are always building new management skills and adapting their leadership style to fit their team's needs, so be open to taking a new approach when needed.

## **Don't make promises that you can't keep**

Get comfortable saying phrases like “I will look into that and get back to you” or “I’ll do my best to make this happen”. New managers can sometimes be a bit overzealous with making promises to their teams. A new leader will see a problem and eagerly want to fix it, so they tell their team that they’ll get it sorted. The issue is that in the early stages of your new managerial role, you may not be familiar with all the roadblocks that may make it hard to change things.

Sometimes there will be a glaring issue that seems like a simple fix. Maybe your team is using a slow, and laborious process because they don’t have a new piece of software that most other companies use to automate or streamline certain functions. Or there may be a company policy that feels old and outdated, like an old-fashioned dress code that feels overly formal and non-inclusively gendered in today’s culture, that is causing frustration for your employees. You may hear the problem and think that it will be easy to solve, but you likely don’t know how resistant to change higher-level leaders are or how limited your team’s budget for new tools may be. Maybe past managers have brought up similar concerns and been denied already.

Instead of making promises for change, empathize with any concerns that employees bring up and make it clear that you will pass on those concerns and make an effort to get them addressed. If you’re a new mid-level manager, you’ll need to get comfortable with showing your team that you’re listening to them while balancing the fact that you may get pushback from higher-ups when it comes to changing policies or getting approval and funding for things that your team needs.

## **Don't overlook your own needs**

If you’re a first-time manager, you may find it hard to balance meeting your team’s needs with setting aside enough time for yourself. As an individual contributor, you could spend your time focused on your own work projects, career goals, and development needs. As a manager, you may find it hard to find uninterrupted time to just focus on your own work tasks or even take a lunch break. Your employees

need support, timely answers to their questions, and for their concerns to be addressed, but your needs are important too.

A survey from [The Predictive Index](#) found that 79% of middle managers felt at risk of burnout from the stress of managing others. That same study also found that managers often don't have enough time to participate in training and development activities for themselves. As you head into a new management position, be intentional about blocking out time for your own well-being and professional development. Know when to give yourself a break or a day off to fend off burnout and be sure to look for opportunities to continue to grow your leadership skills. That may mean blocking out a day to attend a management training class or something simple like finding a great leadership podcast to listen to while you catch up on paperwork.