Your Essential Management Tools

by Karine Lipinski MCIPD

Practical tools to help managers day to day

ViridianHR

www.viridianhr.co.uk

About Viridian HR and the Author:

We are People experts for Business Leaders. We help businesses achieve their potential through effective People practices. We aim to make a difference to business performance and working lives, because these go hand in hand.

We have worked within various industries ranging from E-commerce to Technology, Engineering, Manufacturing, Care, Education, Retail and Hospitality. We are also experienced in dealing with fast growing, multi-site, multi-country, dynamic and highly customer focused organisations and have start-up experience.

About the Founder

After 15 years of intense experience in Human Resources and People Management at all levels, Karine Lipinski founded Viridian HR to meet the HR needs of other Senior Executives. Her approach to HR is very much driven by commercial goals and as such operates in the mindset of a true HR Business Partner.

As well as running Viridian HR, Karine is involved in other volunteering causes. As such, she is also the Vice-Chair of the CIPD Chiltern Branch, the Development Governor of a local primary school and regularly helps Year 12 students with their interviewing and CV writing skills. Her interests are diverse and, as well as appreciating literature of the 19th Century, she enjoys a good MMORPG.

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Introduction

Whilst management theories and generic advice can be found everywhere, it's quite difficult to find good quality step by step guidance to help you along the way. This leaves managers who do not work in organisations where HR professionals are available, putting together their own processes for supporting their teams. This invariably means either them spending a lot of time on it or compromising on quality. At Viridian HR we specialise in supporting Senior Leaders on all areas of HR and we know that some areas of management cannot be compromised on to achieve good employee and team performance. Beyond the essential skills that every manager should have which we have covered in a blog post, we are going a step further and offering you tools to help you in some of the most important areas of management. For each of these, additional reading is available on our website and we will point you to it in each section of this book where relevant.

Previous versions of this e-book have proven successful so we will be adding more content regularly for our subscribers.

New Employee Induction

What happens in the first few days of a new employee starting has a direct impact on their engagement and productivity levels later on.

Making sure that new team members understand their role and the wider company context enables them to contribute effectively to the right things and in a way that is expected of them. The quicker you get them inducted, the quicker they can get on with doing the job they've been hired to do and the quicker you can get on with doing your own job as a manager. Not following a structured induction may mean that you miss passing on important information. It's also been shown that employees are more engaged working with a manager who shows commitment to their needs instead of throwing them in the deep end to figure it all out for themselves. It's important that the way new employees are welcomed to your team matches the enthusiasm they experience of having joined your organisation.

Going through an induction, even when a full induction package isn't available, is therefore always a win-win situation. We have put together a checklist to help you go through the main steps. To read more about inducting a new employee, please read our blog post on this topic.

New employee induction checklist

Employee name:

Line Manager:

Department:

Start date:

Before they start:

- ☐ Send them some information about the company or an email to check on them as sometimes there is a while to wait before they can start. If you have a welcome pack or more commonly a new starter pack from HR, it may be good to send it at this stage so they can read it and complete the paperwork ready for their first day.
- ☐ Ideally, you will also personally give them a call or arrange a video call to welcome them to your team and show your enthusiasm of working with them.
- ☐ Ensure their work equipment is ready for their first day:
  - Computer/laptop and login information
  - Telephone
  - Access card and/or keys to the office
  - Set up their office space with essential items and clear out unnecessary items (some companies go the extra mile and leave goodies on the desk such as chocolates or flowers)
  - Allocate induction tasks to a number of colleagues if relevant

On their first day:

- ☐ Give them an overview of what the induction will cover and ask what they want to know
- ☐ Tour of the facilities
- ☐ Health and Safety must:

  - outline any health and safety precautions the employee must take to protect them from harm
  - outline any training they will need to do their job safely, and without endangering other workers, and any equipment and protective clothing the employer will provide
  - ensure they know what to do if there is a fire, accident or another emergency
- Send an email to all staff to introduce the new starter, past experience and their area of responsibility within their new role (your new starter may want to draft a few lines about themselves to add to your email and share some more personal information about hobbies for example)
- Introduce them to other team members in a team meeting or one to one
- Introduce them to the rest of the office staff
- Have lunch with the new starter. If pushed for time, show them places around the office whilst picking up your take away and grab a coffee together at some point during the day.
- Avoid overloading them with information; you don’t want to scare them off! Also, explain the jargon as you go along.
- Ask them how they are doing at the end of the day

During their first week:

- Show the org chart and explain who does what and who the role will mainly interact with and why
- Explain where main roles/departments fit within organisation, aims and challenges faced by each department
- Explain the company’s history, culture, values and services/products
- Explain the company’s strategy and high level challenges faced by the company
- Provide full job spec if not already done
- Explain what the initial challenges are for this role
- Explain what is expected of the role for the first few weeks and longer term
- Explain how performance is assessed within the company

- Show them the various systems they will use or assign them a buddy (peer) who can take care of your new starter, show them systems and initially answer any questions they may have.
- Catch up with them at the end of the week and ask how they are doing
- Ask them if there is anything that they would like more information on

During the first month:

- Arrange meetings with key employees that the role will be liaising with (video conferencing may be used) and their challenges
- Set initial performance objectives (SMART objectives – you can use the suggested template in the next section)
- Diarise short weekly recurrent, informal catch up meetings to answer questions on tasks (and avoid being disrupted with too many questions during the week)
- Diarise quarterly recurrent one to one meetings to review performance objectives, to discuss how they are doing against those objectives, amend them as business needs change and check what input they need from you/others
- Schedule a reminder in your calendar a week before the end of their probation so that you can then think about what you want to do next
- At the end of the first month, ask how things are going and give some initial informal feedback
- Check if any further help/training is needed

During the probation period:

- Assess how the employee is reaching their objectives
- Decide whether you want to confirm the employee in their role or not
- Ask the employee how useful they found their induction and what they wish had been done differently (so that you may amend this checklist further to suit your organisation and the needs of your employees)

Setting Objectives

As well as being clear with their role and responsibilities, employees need to be aware of the direction they're travelling in and what they are trying to achieve overall. This way, they can better prioritise where their efforts need to be and keep their motivation going as they know how their contribution impacts their organisation's success.

Setting objectives comes naturally during annual reviews as there is normally a template available within the process. All too often however, other opportunities are being missed as events happen outside of the scope/timings of the annual review. An employee starting a new role, being promoted, changing role, the team changing or a change of company strategy for example are all perfect times to set or revisit previously set objectives.

The underlying idea with objectives is that they exist to support the achievements of the company as a whole. It is therefore better for an organisation to set objectives from the top and cascade them down so that everything that is done within departments and teams and by individuals mainly just fit together is a coherent way. This said, each layer of the organisation need to be involved in coming up with the objectives that they have control over to ensure that they are realistic and that meaningful conversations can be had around priorities and input needed from various stakeholders. Also, it is a great way of making full use of the specific expertise of each job holder as essentially, they know their role best.

So, ideally businesses first communicate the company strategy, then departments, then teams and finally, individuals. Too many organisations still expect managers to set objectives to their team members whilst they haven't yet themselves agreed their own objectives or been communicated the company's overarching strategy. This often creates unrest amongst managers and lack of commitment to objectives generally.

Assuming that the above cascade of objectives is in place, you can use a simple template for individual objectives as can be found below. This template doesn't take long to update so it's strongly advised to review and update objectives quarterly so that they are a work in progress document and take no longer than one hour to update. Why not ask each team member to send you their pre- filled document ahead of the meeting? The meeting can then focus on the discussion and tweaking some parts of the form rather than taking lots of notes and having to do it all yourself after the meeting. This not only makes it easier for you to update the form, it's also a great tool to prepare yourself for the tone of the meeting and consider/weight your staff member's contribution accurately.

For more information on setting objectives, check out our blog post on this topic here.

Getting back to our practical tools, when setting individual objectives using the table below, make sure that your objectives are SMART:

Specific – Be precise about what you are going to achieve

Measurable – Quantify your objectives

Achievable – Are you attempting too much?

Realistic – Do you have the resources to make the objective happen?

Timely – State when you will achieve the objective

As well as being SMART, the best objectives will take into account the skills and overall development needs of each individual for their own career and stretch them as much as possible.

Individual Objectives

	Objective	Detailed description	Success Criteria	Deadline	Weight (in%)	Update/review notes
1 You can have more than 5 however less is more to achieve focus	Give it a name	What needs to be done? (Note: Leave the how to the individual if possible)	i.e. what evidence will you be looking at? E.g. Any specific data, any expected feedback…	By when does this need to be achieved?	Total should be 100%. (enables you to set priorities and define level of effort. It also helps explaining any bonus award	Every quarter, final objective notes rather than employee vs manager
2						
3						
4						
5						
Overall comments: (Note: particularly useful to sum up help/development agreed and general manager observations on performance)						

Giving difficult feedback

Invariably there are times when feedback is needed and has to be given. What's important to do first is to be in the right frame of mind. Let's be honest, feedback is just feedback, it's only difficult because it's uncomfortable and a lot of managers are out of practice. It's probably also harder for some managers because they've received feedback that was poorly delivered and they don't want to have the same effect on people, especially people that they like or that they need in their team.

Putting things into perspective, feedback is experienced differently by each and every employee – some people struggle to give feedback whether negative or positive, some people struggle to receive feedback and others want constructive feedback to feed valued and understand where they need to improve. Your role as a manager is to get the best out of each and every member of your team - giving feedback is one way for you to achieve that.

The most effective way to give and receive feedback is to create the right environment for it so let's focus on that and if you'd like more insights into feedback, please read our article.

Before you attempt to give feedback to employees, the right context needs to be present:

- Starting from the right mind-set, and from past experience of dealing with a multitude of managers, it is important to remember that:
    - people do care about doing their job well,
    - they may actually not have noticed that there is a problem,
    - you hired/promoted them because you or someone else deemed them best suited to the job,
    - as a manager, you are the person responsible for getting the best out of individuals on your team so you need to find out how and adapt your style to get the best results.

- Make sure you have regular one to one catch ups in your diary with each team member (weekly or fortnightly is fine) and that you attend these. This regularity will improve your relationship and understanding of your staff member's needs. It will also help you steer any project you foresee going wrong before it actually does, and therefore avoid you being in a situation where you have to give difficult feedback.

- Take a look at your relationship with your team member – do they trust you? If the answer is yes, then the feedback will be easier to deliver. If the answer is no, you need to address this and build trust through better two way communication during your one to ones. If the relationship isn't there, you potentially run the risk of entering conflict and/or having low impact when delivering your feedback.

- Do you know what went wrong? What facts or actions have you observed (yourself, not through a third party and make sure that all of it is objective and doesn't come across as a judgement of their personality or values).

- Do you know *why* this went wrong? This is very important as the context may have made things go wrong rather than the person's actions or omissions.

- Is this actually important to address and why? Some things have little impact but some have an impact on the future quality of work and the team and/or company's success so they must be addressed. Start by reflecting on what matters most and acting on it – don't do it all at once as you may overwhelm the person and dissolve the attention that they are able to give to the main issues. Also, addressing the main issues may mean that smaller problems look after themselves and avoid the person feeling undervalued by a long list of failings.

- Think about how best to address this to the person based on their style and possible reactions. What is important is that they take learning away from this in a positive way, not what you have actually said. Through questions, you may realise that people have already assessed the situation and taken away their learnings and you merely had to show that you had noticed the problem and that you agree with their views – it can be as easy as this!

- Think whether this feedback has to be delivered in one chunk or whether ongoing support to address the issue is a better way to get results.

- If necessary, take a step back and ask a “critical friend” e.g. fellow colleague, your own manager or HR to challenge your thinking and offer suggestions on ways to address the issue.

- Be aware that you have a position of authority over your employee and that anything that you say may seem worse to them that what you are actually saying. Indeed, as their manager, you are the one who develops them, promotes them, gives them a pay rise, so anything that you say may be a cause of worry to them for either their career or their job stability.

- Last but not least, never give difficult feedback in front of others, it will undermine your employee in front of the group and can damage the relationship you have with them.

Examples of performance questions to add to your 1-1s to give difficult but constructive feedback:

- How do you think this project went?
- What made it difficult?
- What were you trying to achieve/do?
- Why do you think this was the outcome?
- What were the contributing factors?
- Where do you think things could have been done differently?
- Do you think anyone including myself could have supported you better with this and how?
- How can you resolve this, how and by when?

- What do you suggest we/you do to avoid it happening again?
- Do you understand my point of view and what do you think about it?

Throughout the conversation, make sure you show your support:

- Agree with their point of view where you can
- Only offer advice when asked for it and after you understand the context.
- Treat them like adults and therefore allow them to come up with their own ideas/suggestions.
- Listen more than you talk – they ideally need to find the way to move on so that they will stick to it more easily. Also, coming up with ways to resolve an issue puts the action and accountability back on them.
- Commit to the things you agreed you can do to help – do not take ownership for the problem lightly as usually it is their responsibility to make amends and part of their job/development will be to take action on the feedback.
- Be a role model and share where you might have been wrong and how you will do things differently next time.
- Accept and invite feedback both ways
- If the reason for the issue is personal, show compassion and ask how the company/you can help - you may need HR’s support to stay in line with company procedures and the legal framework.
- Close the loop at the next meeting by ensuring that what was agree has been done and discuss any new outcomes. And always recognise what they’ve done well as a result of the feedback and the actions they took.

Reflect on how it went after you’ve given feedback:

- Did the employee understand the feedback?
- Was the employee agreeing with you? The employee not talking or just saying “yes” doesn’t mean that they agree, so assess how it went, all the clues that they’ve given in their wording and mannerisms.

- Do you think you tackled the problem with the right level of directness for this employee? It helps to start light and increase in intensity if your messages appear lost.
- Have things improved/been fixed since you raised them?
- Have they applied the feedback to other areas of their work?
- What have you learnt about this employee that will help you tackle giving feedback to them in the future?

Managing change

Change is omnipresent in organisations nowadays and despite this, many employees will resist change and try to hold on to what they know and how things are done.
Change is hard for employees because they often don't have full visibility on the reason for the change and on the vision of what the company is trying to achieve. What they know for sure is what they will or may lose throughout the process - which is what they know and are comfortable with. This is a very important point to understand and should mould your attempts at introducing and communicating change to your team.

For change to be effectively managed, you need to create the right framework for it.
The right environment is usually to communicate openly and effectively the vision of the "after-change state" so they can picture what it will be like when the change has happened and what they will gain throughout the process. It also gives them an understanding of the trajectory and guides their actions so that this end goal can be reached. Depending on the change initiative at hand, if you can manage to communicate how this would be best done now, even better!

As a second stage, keeping communication flowing is key and addressing peoples' objections and fears during the process is essential. Having a key team member on board with the change can help achieve that. Likewise, listening to your team's input and ideas will help stir the implementation in the right direction. After all, many changes are executed by the team or impact their day to day job so, by listening to their concerns, you may uncover that you have missed something whilst planning the implementation! It also enables people to be more involved and actively participate.

Along the way, some challenges will undoubtedly come in the way of the change. This is fine! Make sure that you facilitate the accomplishments of your team by removing obstacles as much as possible and by supporting them appropriately to overcome these challenges. Ideally, each step forward in the right direction will be celebrated and you will reflect with your team on challenges and what you all learnt from them.

When change is proving difficult, try these strategies to handle the resistance:

- Spell out the benefits of the change clearly;
- Focus the attention on achieved steps and "wins";
- Give clarity on project implementation timetable and what comes up next;
- Encourage your team to share their concerns and challenges and work with you on how to move on by focusing on what is achievable rather than what isn't;
- Don't take it personally - work through ambiguity and frustration as they arise; after all, resistance means you have touched something important which is a good thing;
- Use neutral language and lead by example in responding calmly in stressful situations.

Recruiting effectively

Successful recruitment means that you have hired the best person for the role; someone who will perform, be engaged, get on with and complement your team and help move the business forward.

To achieve this, you need to be very clear on what you are looking for in a candidate. You also must have thought through exactly what you need. For more information, please read our blog post on successful recruitment.

Answering questions the following questions will help you refine what it is you are looking for to structure your approach:

HIRING NEEDS QUESTIONNAIRE

Introduction

In order to be able to maximise the fit of the candidates with the jobs that you're hiring for, here is a short questionnaire for hiring managers to reflect on.

When used together with the requirements and duties outlined in the job description, it will give you a better picture of your overall requirements both in terms of hard skills/experience and also soft skills.

The aim of this questionnaire is to enable you and those supporting you with the recruitment (HR, hiring manager, regional director, anyone else involved etc…) to work together more effectively and hire the candidate best matching your requirements.

When answering the questions, please try to keep in mind the specifics of the role itself and its current context.

Context of the role:

1. Current team strengths

2. Current team weaknesses

3. Current expectations and previous difficulties encountered with previous stakeholders

4. Current working conditions

5. Your managerial expectations i.e. what support can / can't you provide, how do you work effectively with your team?

Skills/experience

What are the 5 essential skills / experience needed that everyone involved in the process needs to evaluate?

1.

2.

3.

4.

5.

What are the 5 essential personality traits that everyone involved in the process needs to evaluate?

1.

2.

3.

4.

5.

Success criteria:

What will you need the person to have achieved in a year in order to feel that the recruitment was successful?

The future:

In an ideal world, thinking about the future, which skills would be beneficial for the candidates to have to satisfy future job openings/promotions in the team? (e.g. do you think that your team would benefit from someone with potential to develop into a managerial role, a more technical role, who has an interesting specialism that would benefit the team etc)?

The recruitment process

Who will be involved in the recruitment process and when and what do they bring to help you assess the candidate and make the best decision?

Once you have figured out exactly what you are looking for and are set to start the recruiting, it will help all the interviewers to refer to an interview assessment grid that describes the competencies or traits that are essential to the role. This grid will also help everyone prepare how they will assess the candidate against these. Other competencies will be useful to assess as well but hopefully everyone will validate that the successful candidate meets at least all of the essential ones.

Interview assessment grid

Position interviewed for:

Line Manager:

Candidate's name:

Interview date:

	Competency	How will I assess this?	Notes	Rating
1		E.g. Give me an example of when you…		
2				
3				
4				
5				
	Traits	**How will I assess this?**	**Notes**	**Rating**
1		E.g. Tell me about a situation when….		
2				
3				

Comments - good fit or not and why:

Running effective meetings

One of the tasks a manager must master to be effective at work is the art of meetings! Indeed, in your role you will be expected to lead your team, delegate and coordinate for example, all of which will require face to face interaction with people. Whether you have one, ten or more people in the room, a meeting is an opportunity to get stuff done so make sure you're prepared. If you'd like to read more about running effective meetings, please visit our article "five ways to make your meetings more productive".

You can also use the list below as a reminder of effective meeting techniques:

Objective / Purpose

- Plan the duration of the meeting and who should attend
- Focusing on closing or coming up with action points

Right participants

- Stick to the minimum necessary participants to reach your objective to avoid wasting other people's time

Agenda

- To be sent before the meeting in the meeting invitation with supporting documentation if appropriate for pre-work
- Prepares attendees for what input is required from them
- Start with the item with highest priority as attendees will have to give it the biggest focus
- Give timings for each part of the meeting
- Announce the purpose of the meeting

Timings

- Start meetings on time - it shows respect to the attendees who arrived on time
- End on time - people have other things to do so don't make them feel trapped and stressed
- Respect timing for each part of the meeting so that everyone has their chance to contribute
- Avoid spending all the time on 1 or 2 topics or other participants will have wasted their time during the meeting and their efforts preparing for that meeting
- Schedule a separate meeting if a topic is likely to overrun or needs more time

Action points

- After each meeting, end up with a To Do list showing Who, What, When
- Send summary of action points to attendees after the meeting by email
- Follow through on actions at the next meeting for accountability and effectiveness

Conclusion

Managers are essential to the success of any company and have to constantly juggle between company and employee expectations. Simple tools like the ones I've shared in this book often make the biggest difference in the day to day lives of managers and their team members; which in turn has a positive impact on the company's performance as a whole.

We review the contents regularly and send new versions to our subscribers. If you'd like to see any other topic included in the upcoming version, please let us know by email enquiries@viridianhr.co.uk