

# FROM BUDDY



# TO BOSS

## 12 STEPS TO SUCCESSFUL STAFF PROMOTIONS

**P**romoting Susan to that new management position seemed like a great idea. She always worked long hours and wanted to move up. And she was so popular with her co-workers! Why bother tracking down an outside candidate when there was already a staff member ready to roll? Unfortunately, problems cropped up as soon as Susan took on her new duties. She failed to keep her staff informed about new initiatives. She scheduled meetings only to keep everyone waiting while she completed some phone calls. The staff—formerly her friends—started to grumble that she was “too bossy.” People lost interest in doing a good job and the business started missing its sales and profit goals. Not a pretty picture, but one that is all too common. Done right, promoting from within motivates the entire team and fosters staff loyalty. Done wrong, it sparks workplace friction and resentment. How can you make sure your own internal promotions move people up the ladder of success without falling on their heads? For the answer, look to the first half of this article, in which consultants from around the country offer valuable pointers. The second half contains advice for the new supervisors themselves.

**BY PHILLIP M. PERRY**

## PART I: TIPS FOR COACHES

### 1. BE A GOOD ROLE MODEL

Your own behavior must demonstrate the style of leadership you expect from newly promoted individuals. For starters, you need to treat your staff fairly. "If they have been mistreated by their own managers, new supervisors will commonly do the same with their subordinates," warns Ian Jacobsen, president of Jacobsen Consulting Group, Sunnyvale, CA. "Just as a child from an abused home is more likely to be an abuser, new supervisors who have not had good role models will behave in dysfunctional ways."

Second, you need to play by the company rules. "A lot of people think they can start slacking off once they are promoted," says Peggy Morrow, a Houston-based consultant. "Show them this is not your way by being a strong role model."

### 2. INVOLVE YOUR STAFF IN THE PROMOTION

What characteristics will make a successful candidate for the available position? Ask your staff. People will more likely accept a decision in which they have invested their own ideas. "Have the people who are going to be supervised participate in the development of criteria for selection," says Jacobsen. "Hold a meeting to discuss how the job may have changed in recent months and what the company now needs to look for in a new leader."

The criteria may be as varied as technical competence, communications ability and talent in solving problems. "Brainstorming these criteria not only gives people some input into decision making, but also helps them better understand more of what the job entails," says Jacobsen. "All of this will make it easier for the new person coming in as long as the criteria have been adhered to when the selection is made."

### 3. TRAIN THE PERSON

Good leadership is learned. You need to groom the person for the job. "Too often today, new supervisors are not given a sense of what to expect from their positions," says Judy Foritano, president of Somerset Consulting Group, Titusville, NJ. "They need to be trained so they know how to deal with relationship issues."

Consider having a current supervisor mentor the prospective manager, suggests Fred Martels, president of People Solution Strategies, Chesterfield, MO. This mentor may develop a plan for success and put it into motion. "The mentor can serve as a coach, answering questions such as 'what will your first day as a supervisor be like?'" suggests Martels. The mentor may also outline the expectations the company holds for new supervisors and impress upon the prospect the need to meet them.

One approach is to give prospective supervisors temporary work assignments which will hone the skills required to do similar work full time. "Try having the prospective manager develop the skills of a buddy," suggests Mel Kleiman, President of Humetrics, Houston. "Then see how the person deals with problems that arise."

Skills need not all be gained on the job. "Maybe someone is president of the PTA or other civic organization," says



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Kleiman. "Encourage individuals to get active in such groups because it is a non-threatening way for them to gain skills that can be effective on the job."

### 4. ANNOUNCE THE PROMOTION APPROPRIATELY

The formal transition to supervisor must be announced in an unambiguous way so the staff realizes the new supervisor has the backing of the organization. The process will vary by size of group. "In a small group, I would hold a short meeting to inform the group of decision," says Martels. "Then let the new supervisor take the reins." The new supervisor needs to not only express his or her vision, but also must let people know she is behind each of them. "People always want to know 'What's going to happen to me?'" says Martels. "If the new supervisor expresses a desire to move each of them forward, then everything will be okay."

In large work group, says Martels, communicate the promotion through a letter from the person who made the decision. "Inform people of the decision and ask for their support. Invite anyone with questions to come and see the person who wrote the letter."

### 5. FOLLOW THROUGH AFTER THE PROMOTION

How's everything going? That's the question to answer after a person is promoted. Jacobsen suggests finding out on an informal basis. "As you walk around the workplace, ask people how the new manager is working out. You are not being a snoop, but you are getting the feedback you need as you go about your task of coaching the new manager."

Informal discussions are likely to be more fruitful than passing out a questionnaire, says Jacobsen. "People feel much more at ease talking about this on an informal basis."

## 6. TACKLE PROBLEMS

Suppose the new manager just can't seem to get the respect of subordinates, who start carrying out their duties in a perfunctory manner or let things slide. The way to tackle this issue is to ask questions, either of the supervisor or of the subordinates. "Be sure to cite the specific behaviors," says Jacobsen. "And then state that this is not what you expected when you made the promotion."

If you are approaching one of the new supervisor's subordinates, ask: "I've really been surprised that [...] doesn't get the respect from you that I thought he would. This is what I see going on [*cite the specific behavior issues*]. How come?"

## PART II: TIPS FOR NEW SUPERVISORS

### 7. PARTICIPATE IN THE FORMAL ANNOUNCEMENT

Your supervisor will announce your promotion in a staff meeting, then invite you to say a few words. Consultant Jacobsen suggests you express how happy you are to be in your new role and discuss how you want to retain your friendship with each of them, while understanding that in your new position you will have new expectations as to how you will interact with them.

"State that you have a vision as to what the group can accomplish and describe what this vision is," says Jacobsen. Add that you want to include them in the process of developing shared goals and that you will be talking with each of them on an individual basis to obtain their ideas before making your decisions. Finally, let them know you want to help each of them achieve their personal goals.

### 8. BECOME A SKILLED LISTENER

"Listening is a key skill for a leader," says Martels. Most workplace consultants agree. Listening is a vital and perhaps determining factor in the ability to understand and motivate people. "When someone talks with you, pause whatever you are doing and give your full attention. Make good eye contact. Be genuinely interested in what people have to say and learn to have real empathy for them."

Says Morrow: "Ask questions. Talk with your people. Come back and get their ideas for improvement. What can be changed? What can be made better?"

### 9. LEARN HOW TO OPEN PEOPLE UP

Part of being a good listener is encouraging people to speak up in the first place. "Get skilled in stimulating people to advance their ideas and opinions," says Martels.

## HANDLING RESENTMENT

Getting promoted is great. But how about Sam—that co-worker who was bucking for the same job and got passed over? Now Sam will report to you. How will you handle his resentment?

Rather than wait for Sam's simmering emotions to explode into workplace issues, schedule a one-on-one talk with him, says Ian Jacobsen, president of Jacobsen Consulting Group, Sunnyvale, CA. "Acknowledge that you know the person was a contender for the job. Say you recognize it may be an awkward situation and your intention is to create a situation where Sam will be able to thrive. You want to honor his wishes to move up and will do whatever you can do to help support him in his career growth."

Then emphasize that you want to cultivate a positive working relationship. "State that you look forward to working with Sam as someone who is strong and can add to the team," says Jacobsen. Follow through with additional one-on-ones when situations arise that can benefit from his expertise. "Involve Sam as an ally by getting his perspectives on issues."

In serious cases, the resentful co-worker may harbor ill feelings that start to surface in performance issues. In such cases, once again, it is important to act promptly. "The danger of waiting is that it gives time for the per-

son's resentments to fester," says consultant Judy Foritano, president of Somerset Consulting Group, Titusville, NJ. "The individual can become dysfunctional or counter functional to the team." So schedule one-on-one meetings and concentrate on performance issues. "You need to be very sensitive to changes in behavior," says Foritano. "Keep notes of such changes and be able to describe them and their impact on work performance."

Not all such behaviors need be directly tied to the staff member's work duties. Resentment may surface, for example, in the forms of derogatory comments, jokes, a decline in initiatives or even in long silences during meetings. Because all such actions impact team performance they may be referenced in a one-on-one with the staff member.

Describe what you have seen and ask what is causing the activity.

You might address such problems in words such as these: "Sam, I've noticed that you have not been [*performance description*]. When I asked you to do that last report you didn't get it in on time. Tell me a little bit about why that happened." Avoid making value judgments such as "you are not supporting my authority" or "you are not a team player." Such assessments address attitudes rather than actions and will only spark denial and arguments. Instead, identify the behaviors that are causing you to feel the person is not supporting you as a new supervisor. Then talk about those.

Such meetings can be difficult at first. "It requires a strong sense of self-esteem for a new boss to sit down and have such a chat," says Foritano. "But these talks will help you get the information you need, and can help avoid an escalating performance problem with the staff member."

And when people advance ideas, don't shoot them down. "Avoid idea-killer phrases such as 'I can't sell it to management' or 'We've tried that before.' Instead say, 'Tell me more about that' or 'How does that work?' and 'How does the group feel about that?' These approaches encourage people to bring more of themselves to the table."

Every group has an informal leader, a person who is not officially in management, but seems to perform as a pivot for the group's ideas. "You will be smart to identify and work with your informal leader," says Morrow. "If they support your initiatives, everyone else in the group will. Get their 'buy-in' by asking their opinions, listening to them and working extra hard to get their input."

#### 10. AVOID PRECIPITOUS ACTIONS

**M**any new supervisors want to make their mark quickly with dramatic initiatives. Avoid this. "Don't make major changes in the early days," says Morrow. "Your authority has not yet been established." Instead, get that valuable feedback from your staff so they will feel invested in the decisions you will make.

#### 11. SOCIALIZE WITH YOUR STAFF


**S**o now you're the boss. Can you still have beers with your peers? "There used to be a rule that you had to stop being buddies when you were promoted to management," says Morrow. "Today you can still be friends and maintain authority." Indeed, maintaining social relationships pays rich dividends. Today's supervisor gets work done through subordinates. And if you're going to get work done through others, they have to be on your side.

Furthermore, in social settings your staff is more likely to provide you with valuable new ideas and advance warnings of brewing problems. "People will tell you things over a beer that they won't tell you otherwise," says Jacobsen. "That's the value of maintaining relationships and communications."

Socializing also helps develop trust among the members of your staff. And that can help smooth the way when it comes time to say "no," as a supervisor often needs to do. People must understand that you are saying no because you have the organization's larger goals in mind, not because you have become "too good for them."

Even so, your relationships with co-workers will change in subtle ways. For example, there may be some resentment from people who remember you as one of the gang and now see you as taking "management's side" in discussions. And how about the jokes about management that always seem to crop up after hours? Should the new supervisor chuckle in harmony? "You can laugh along," says Jacobsen, "but you have to know where to say something like this: 'O.K., that's enough joking. I know Bill and he's not such a bad dude after all, and the things you are criticizing him for, he doesn't have much control over.'" Walking the fine line between humor and disparagement calls for sensitivity as to what is considered a joke and what is considered serious. "The position you are in makes people read things into your messages that they may not have thought of otherwise," says Jacobsen.

To maintain friendship with your employees while mak-



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ing the difficult decisions that you need to make, do lots of listening. "Keep soliciting feedback from people on how things can be made better and you will get a reputation as a person who wants to make a difference," says Morrow. "Do what you can to make each person's job better than before you become a supervisor. The people you used to be just a buddy with will sense that."

#### 12. CONTROL YOUR FEELINGS OF SELF-DOUBT

**I**t's natural for any new manager to have second thoughts or to worry that things are not going as well as they should. "Remember that you have been put in a bigger pot so you have room to grow," says Morrow. "If you knew how to do everything you would have been put there a lot sooner. Talk to yourself with statements such as, 'This is a new job requiring new skills. People are giving me trouble now but I can handle this.'"

Self-talk can also relieve the doubt and anguish that arise when new supervisors have to make decisions, such as termination, that harm other people. "Keep reminding yourself of the criteria you use to make decisions," says Foritano. "The better grip you have about why you make decisions the more confidence you will feel over time."

Your superiors promoted you because they have faith in your capabilities. You should remind yourself of that from time to time. "Remember why you were chosen for the position," says Foritano. "If they didn't tell you the reasons why they judged you would be a good supervisors—and sometimes companies forget to do that—ask them. Remind yourself of your strong points. A personal pat on the back once in a while is perfectly acceptable."

Another way to bolster yourself is to get constant feedback from your staff, says Jacobsen. "The new boss should ask people, 'How's it going? What am I doing that is making life easier for you? Am I doing anything inadvertently that is making life harder for you?'"

For most new supervisors, the transition from buddy to boss is fraught with stress. These tips should help most new managers make a transition that will minimize team disruption and lead to greater profits and success. ■

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*Phillip M. Perry is a free-lance business writer based in New York City.*