

---

# **1. Introduction and Foundations**



# Quick Reflection Activity:

## Identifying Key Management Skills

With Misconception #2, "Your Technical Competence Will Win the Day," we recognize that developing your management skills is crucial for success because you can not only rely on your technical skills. But often those new skills are not so well developed yet. So now I want you to reflect on the top management skills you want to get better at.

**Instruction:** Answer each question honestly and concisely.

1. What are the top 3 or 5 management skills you want to get better at?

- 
- 
- 
- 
- 

2. Why are these skills important for your development as a manager?

- 
- 
- 
- 
-

# Quick Self-Reflection for New Managers

Let's try a quick exercise to see how you're doing in each of these areas.

**Instructions:** Answer each question honestly and concisely.

1. What feedback have you recently received that has surprised you?

2. Describe your latest professional setback. What have you learned?

3. Which area (technical, interpersonal, or leadership) do you feel the least confident in?

4. What's the most significant change you're currently experiencing at work? How do you handle it?

5. Name one leader whose approach you want to adopt. What specific characteristic appeals to you?

# Quick Self-Reflection for New Managers

Let's try a quick exercise to see how you're doing in each of these areas.

**Instructions:** Answer each question honestly and concisely.

1. What feedback have you recently received that has surprised you?

2. Describe your latest professional setback. What have you learned?

3. Which area (technical, interpersonal, or leadership) do you feel the least confident in?

4. What's the most significant change you're currently experiencing at work? How do you handle it?

5. Name one leader whose approach you want to adopt. What specific characteristic appeals to you?

# Management Shift Readiness Self-Reflection Exercise

Let's try a quick exercise to see how you're doing in each of these areas.

**Instructions:** You can rate your agreement with each statement on a scale from 1 (Strongly Disagree) to 5 (Strongly Agree).

## 1. Role Readiness:

I feel confident in my ability to assign tasks to others and trust them to complete these tasks successfully.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

## 2. Strategic Perspective:

I understand how my work and the work of my team align with the larger goals of the organization.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

## 3. People Management:

I am comfortable and effective in coaching others to develop their skills and career.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

## 4. Communication Skills:

I am able to clearly articulate goals and provide constructive feedback to others.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

## 5. Decision Making:

I can make important decisions effectively, even when I do not have all the information I would like.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

6. Time Management:

I am skilled at managing my time and prioritizing tasks when faced with multiple deadlines.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

7. Skills and Mindset for Leadership:

I actively seek out leadership roles and feel that I am effective in leading a team towards its objectives.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

Note:

After completing the questionnaire, you can add up your scores to see your readiness. Higher scores indicate greater readiness and alignment with the skills and mindset required for management. Lower scores may identify areas for development.

# Transition Conversation Task

Find someone who recently became a manager and talk to them about their transition from a technical role to a leadership one. Learn about the challenges they faced and how they overcame them. Ask about any ongoing struggles they have as a manager. Think about what you can learn from their experience that could help guide your own management career.

1. Find out what the biggest hurdles were when they made the transition.
2. Talk about the strategies they used to overcome those challenges.
3. Ask about any struggles they still have as a manager.
4. Think about the key takeaways from their experience that could help guide your own management career.

# Key Management Task and Responsibilities

## Managerial Task Reflection Exercise

Are you ready to take a quick look at your management skills?

**Instructions:** For each core responsibility listed below, rate yourself on a scale of 1 to 5 (where 1 = Rarely, and 5 = Always)

Do I set clear, measurable goals with my team? \_\_\_

Do I develop detailed plans to achieve our objectives? \_\_\_

Do I actively engage in and lead productive meetings? \_\_\_

Do I make informed, timely decisions? \_\_\_

Do I delegate tasks effectively, ensuring clarity and understanding? \_\_\_

Do I maintain open, effective communication channels? \_\_\_

Do I regularly track and assess our progress towards goals? \_\_\_

Do I invest in my team's professional development? \_\_\_

Do I motivate my team towards higher performance and engagement? \_\_\_

Do I build strong, respectful relationships within and outside the team? \_\_\_

Do I lead my team effectively through challenges and obstacles? \_\_\_

Do I regularly review and manage team performance constructively? \_\_\_

Do I demonstrate the behaviors I expect from my team? \_\_\_

Do I effectively guide my team through changes? \_\_\_

Do I ensure that our work meets legal and ethical standards? \_\_\_

Do I promote a collaborative and supportive team environment? \_\_\_

**Reflection:** After rating yourself, identify areas where you consistently perform well and areas with room for improvement. Consider actionable steps you can take to enhance your effectiveness in those lesser-rated tasks.



# New Manager Integration Checklist

To make sure you've got all your bases covered, here's a simple checklist you can use:

## 1. Understand your role and responsibilities

Do you have a clear grasp of your duties, authority, and how you'll be evaluated?	Yes / No
Do you know what success looks like and how it will be measured?	Yes / No

## 2. Know your team structure and individual roles

Do you have a good overview of your team's structure and each member's role and strengths?	Yes / No
Have you scheduled one-on-one meetings with each team member to understand their goals and concerns?	Yes / No

## 3. Access key resources

Have you identified all the resources you and your team need to get the job done?	Yes / No
Do you have access to these resources or know how to get them?	Yes / No

## 4. Get support from upper management

Have you met with your supervisor to discuss your role and expectations and ensure you have their support?	Yes / No
Do you understand how much decision-making power you have and the freedom to lead your team?	Yes / No

## 5. Gain operational insight

Are you familiar with your team's current processes, workflows, and tools?	Yes / No
Are you aware of ongoing projects, upcoming deadlines, and immediate team priorities?	Yes / No

If you answered yes to all these questions then that is great. If you have some answers that are no that means that you need a bit more information or support. So, look at the No's and see what you can do about it to get a yes.

Maybe talk with your manager or another department or maybe you can take action yourself by taking the lead in defining it.

# Checklist Phase 1: Establishing Foundations

Before we dive deeper into each topic, I have prepared a checklist that you can use to hold yourself accountable.

## Establishing Foundations

Activity	Description	Target Completion Date [Date]	Status [Not Started / In Progress / Completed]	Notes [Any specific notes]
Meet with Boss	Discuss role expectations, success metrics, and immediate priorities.			
First Team Meeting	Conduct an introductory meeting to get to know each other and build rapport.			
First One-on-One Meetings	Schedule and conduct initial meetings with each team member.			
Plan regular One-on-Ones	Establish regularly scheduled 1-on-1 meetings.			
Meet Peers & Stakeholders	Reach out to your peers and stakeholders.			
Regular team meetings	Set-up and facilitate regular team meetings.			
SWOT Analysis	Understand strengths, weaknesses, opportunities, and threats.			
Team goals & priorities	Identify the key goals, objectives and priorities for you and your team.			

# SWOT Analysis Template

Team/Project Name	Date	Prepared by
<i>Provide the name of the team or project being analyzed.</i>	<i>Include the current date.</i>	<i>List the names of the individuals involved in this analysis.</i>

## S - Strengths

**Instruction:** Identify the internal attributes and resources that support a successful outcome.

**1. Advantages of the Team:** What unique resources and capabilities does our team possess?

**2. Unique Skills:** What skills or expertise do we have that sets us apart from others?

**3. External Perceptions:** What strengths do others outside our team recognize in us?

**4. Individual Contributions:** What have been notable individual contributions that strengthened our team's performance?

## W - Weaknesses

**Instruction:** Consider the internal factors and resources that could be improved or are missing.

**1. Areas for Improvement:** What critical areas need immediate attention or improvement?

**2. Avoidable Aspects:** What should we avoid doing based on past experiences or limited resources?

**3. External Perceptions:** What weaknesses do others see in our team?

**4. Limiting Factors:** What factors are currently limiting our success or could pose challenges if not addressed?

# O - Opportunities

**Instruction:** Identify external chances to improve performance or reach objectives.

**1. Process Improvement:** What processes can we develop or improve to enhance how we work?

**2. Market or Industry Trends:** Are there trends in our industry that we can leverage for our advantage?

**3. Strategic Advancements:** Are there changes in technology or business strategies that we can adopt to improve our performance?

# T - Threats

**Instruction:** Consider the external challenges that could cause trouble for the project or team.

**1. Immediate Obstacles:** What are the most pressing issues facing our team today?

**2. Technological Changes:** How could shifts in technology affect our current mode of operation?

**3. Demand Fluctuations:** Is there a risk of declining demand for what our team provides?

**4. Stability and Changes:** Are there external factors that could destabilize our team dynamics or focus?

# Instructions for Use:

## **1. Gather Information:**

Compile data and feedback from various sources relevant to your team or project.

## **2. Discussion and Analysis:**

Discuss each category with your team to gain multiple perspectives and insights.

## **3. Draft and Revise:**

Prepare a draft based on initial discussions and refine it as more information becomes available or as situations change.

## **4. Finalize and Act:**

Finalize the analysis and plan actionable steps based on the SWOT insights.

*This template provides a structured approach to conducting a SWOT analysis, helping students or teams identify key internal and external factors that impact their success and challenges.*

# SWOT Example

Let's look at an example. So, imagine we are a software development team in a mid-sized tech company focusing on developing web applications. Their SWOT could look like this:

## Strengths:

### 1. **Highly Skilled Developers:**

- The team consists of experienced developers proficient in multiple programming languages (JavaScript, Python, Ruby).
- High-quality coding standards and best practices are consistently followed.

### 2. **Strong Team Collaboration:**

- Excellent communication and collaboration tools (e.g., Slack, Jira, Confluence) are in place.
- Regular team meetings and agile practices (scrum, sprints) ensure effective teamwork.

### 3. **Innovative Mindset:**

- The team has a strong culture of innovation and creativity.
- Encouragement of continuous learning and adoption of new technologies.

## Weaknesses:

### 1. **Limited Marketing Knowledge:**

- Lack of expertise in promoting and marketing the developed applications.
- Dependence on the marketing department for promotional activities.

### 2. **Project Management Challenges:**

- Inconsistent project management practices leading to occasional missed deadlines.
- Limited use of project management tools and techniques.

### 3. **Insufficient User Feedback Integration:**

- Not enough focus on gathering and integrating user feedback into the development process.
- Lack of structured user testing and feedback loops.

## Opportunities:

### 1. **Expanding Market Demand:**

- Growing demand for web applications in various industries (e.g., e-commerce, healthcare, education).
- Potential to capture new market segments with customized solutions.

### 2. **Partnerships with Emerging Startups:**

- Opportunities to collaborate with startups to develop innovative products.
- Potential for strategic alliances to expand the team's reach and capabilities.

### 3. **Advancements in AI and Machine Learning:**

- Integrating AI and machine learning into web applications to offer advanced features.



- Staying ahead of competitors by adopting cutting-edge technologies.

## Threats:

### 1. Intense Competition:

- Increasing competition from both established companies and new startups.
- Risk of losing market share to more aggressive or innovative competitors.

### 2. Rapid Technological Changes:

- Constantly evolving technologies requiring continuous upskilling.
- Potential obsolescence of current skills and technologies.

### 3. Economic Uncertainty:

- Potential economic downturns affecting client budgets and spending on new projects.
- Risk of reduced revenue and budget cuts impacting team resources.

## Action Plan:

### Capitalize on Strengths

#### 1. Leverage Developer Skills:

- Assign complex, high-impact projects to the most skilled developers.
- Encourage knowledge sharing through internal workshops and code reviews.

#### 2. Enhance Collaboration:

- Continue to utilize and optimize communication tools and agile practices.
- Organize regular team-building activities to strengthen team cohesion.

#### 3. Foster Innovation:

- Allocate time for team members to explore new technologies and propose innovative solutions.
- Create an idea-sharing platform to gather and implement creative ideas.

### Address Weaknesses

#### 1. Improve Marketing Knowledge:

- Provide basic marketing training for team members to understand the essentials.
- Collaborate closely with the marketing department to learn and integrate marketing strategies.

#### 2. Enhance Project Management:

- Implement standardized project management practices and tools.
- Provide training on project management methodologies (e.g., Agile, Kanban).

#### 3. Integrate User Feedback:

- Establish structured processes for gathering and integrating user feedback.
- Conduct regular user testing sessions and incorporate findings into the development cycle.

### Seize Opportunities

#### 1. Capture Expanding Market Demand:

- Conduct market research to identify and target new market segments.
- Develop customized solutions to meet specific industry needs.
- 2. **Forge Partnerships:**
  - Reach out to startups and propose collaboration opportunities.
  - Explore joint ventures to leverage combined strengths and resources.
- 3. **Adopt AI and Machine Learning:**
  - Invest in training and tools to integrate AI and machine learning into products.
  - Develop prototypes and pilot projects to demonstrate capabilities.

## Mitigate Threats

1. **Stay Competitive:**
  - Conduct regular competitive analysis to understand market trends and competitor strategies.
  - Innovate continuously to offer unique and superior solutions.
2. **Adapt to Technological Changes:**
  - Encourage continuous learning and professional development.
  - Stay updated with industry trends and emerging technologies through conferences and training.
3. **Prepare for Economic Uncertainty:**
  - Diversify revenue streams and explore new business models.
  - Build financial reserves and contingency plans to manage potential downturns.

## Priority List with Quick Wins

In addition to the priority list, let's identify some quick wins—actions that are relatively easy to implement and can yield immediate positive results. These quick wins will help build momentum and demonstrate progress early on.

### Immediate Priorities (High Impact, High Feasibility):

1. **Leverage Developer Skills:**
  - **Action:** Assign complex, high-impact projects to the most skilled developers.
  - **Reason:** Maximizes the team's technical strengths and ensures high-quality outcomes.
2. **Enhance Collaboration (Quick Win):**
  - **Action:** Continue to utilize and optimize communication tools and agile practices.
  - **Reason:** Ensures effective teamwork and timely project delivery. This is a quick win because the tools are already in place and just need optimization.
3. **Improve Marketing Knowledge (Quick Win):**
  - **Action:** Provide basic marketing training for team members.
  - **Reason:** Helps the team better understand market needs and enhance product promotion. This is a quick win because basic training sessions can be organized swiftly.
4. **Enhance Project Management:**
  - **Action:** Implement standardized project management practices and tools.
  - **Reason:** Improves project efficiency and reduces the risk of missed deadlines.

## Secondary Priorities (High Impact, Moderate Feasibility):

### 1. Capture Expanding Market Demand:

- **Action:** Conduct market research to identify and target new market segments.
- **Reason:** Opens new revenue streams and increases market share.

### 2. Adopt AI and Machine Learning:

- **Action:** Invest in training and tools to integrate AI and machine learning into products.
- **Reason:** Keeps the team at the forefront of technology and enhances product capabilities.

### 3. Integrate User Feedback (Quick Win):

- **Action:** Establish structured processes for gathering and integrating user feedback.
- **Reason:** Ensures that products meet user needs and improve user satisfaction. This can be a quick win by starting with simple feedback forms and initial user testing sessions.

## Long-term Priorities (Moderate Impact, High Feasibility):

### 1. Foster Innovation:

- **Action:** Allocate time for team members to explore new technologies and propose innovative solutions.
- **Reason:** Encourages continuous improvement and keeps the team motivated.

### 2. Forge Partnerships:

- **Action:** Reach out to startups and propose collaboration opportunities.
- **Reason:** Leverages combined strengths and resources for mutual benefit.

## Contingency Priorities (High Impact, Low Feasibility or Low Impact, High Feasibility):

### 1. Prepare for Economic Uncertainty:

- **Action:** Diversify revenue streams and explore new business models.
- **Reason:** Mitigates risks associated with economic downturns and ensures financial stability.

### 2. Stay Competitive:

- **Action:** Conduct regular competitive analysis to understand market trends and competitor strategies.
- **Reason:** Ensures the team remains competitive and aware of industry movements.

### 3. Adapt to Technological Changes (Quick Win):

- **Action:** Encourage continuous learning and professional development.
- **Reason:** Keeps the team updated with industry trends and ready to adapt. This can be a quick win by promoting online courses and certifications.

## Example Priority List with Quick Wins:

### Immediate Priorities:

- Leverage Developer Skills
- Enhance Collaboration (Quick Win)
- Improve Marketing Knowledge (Quick Win)

- Enhance Project Management

### **Secondary Priorities:**

- Capture Expanding Market Demand
- Adopt AI and Machine Learning
- Integrate User Feedback (Quick Win)

### **Long-term Priorities:**

- Foster Innovation
- Forge Partnerships

### **Contingency Priorities:**

- Prepare for Economic Uncertainty
- Stay Competitive
- Adapt to Technological Changes (Quick Win)

### **Note:**

By identifying quick wins, the team can achieve early successes, boosting morale and demonstrating progress, while also working on more complex and longer-term initiatives.

# Checklist Phase 2: Accelerating Team Performance and Strategic Impact

Here's a checklist of phase to help you to hold you accountable.

Activity	Description	Target Completion Date	Status	Notes
Priority List Action Items and Quick Wins Execution	Identify and start working on priority list items and quick win opportunities.	[Date]	[Status]	[Specific wins targeted]
Master Your Responsibilities	Make a detailed list of all responsibilities and prioritize them based on alignment with team goals and quick win opportunities.	[Date]	[Status]	[Notes on responsibilities]
Check-in with Your Boss	Set up regular meetings with your boss to align on priorities, progress, and feedback.	[Date]	[Status]	[Meeting schedule and feedback notes]
Dig Deep into Challenges	Investigate and address key issues by asking critical questions and finding effective solutions.	[Date]	[Status]	[Specific challenges and solutions]
Keep Everyone Accountable	Hold regular team and one-on-one meetings to track progress, address obstacles, and provide support.	[Date]	[Status]	[Notes on accountability measures]
Document Your Winning Strategies	Document best practices and key processes identified through problem-solving efforts.	[Date]	[Status]	[Documentation details]
Show Off Your Results	Prepare and present clear and concise updates on team goals and results to upper management.	[Date]	[Status]	[Presentation details]
Collaborate Across Departments	Initiate and lead a growth project that involves collaboration with other departments to tackle strategic challenges or opportunities.	[Date]	[Status]	[Project details]
Paint a Vision for Your Team	Develop and communicate a clear and inspiring vision for your team's future, including detailed goals, strategies, and initiatives.	[Date]	[Status]	[Vision and plan details]
Keep Growing and Improving	Regularly gather feedback from the team on processes, leadership, and workplace vibe, and set up targeted skill development workshops.	[Date]	[Status]	[Feedback and improvement details]

This template provides a structured way for new managers to plan their initial actions, track progress, and make adjustments as needed. It can be customized to fit the specific needs and circumstances of each manager and their team.