Managing Employees 201

October 11, 2023

PIERCE ATWOOD LLP

Agenda

- Quick Refresher
  - › How does the law affect my role?

- Road Map for Effective Management

How does the law affect my role?

- Discrimination prohibited
  - › Commit to articulating a legitimate, non-discriminatory reason for all employment actions
    - PERFORMANCE OR BUSINESS NEEDS SHOULD BE THE PRIMARY NON-DISCRIMINATORY REASON FOR MOST EMPLOYMENT ACTION
    - Always ensure no pretext
- Accommodation required
  - › Disability, religion, pregnancy
- Retaliation prohibited
  - › Be aware of timing of all adverse employment action
- At will employment has significant limits
- Employees have legally protected right to be out of work (sometimes for extended periods of time)

The Road Map

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The Goal for all Bosses

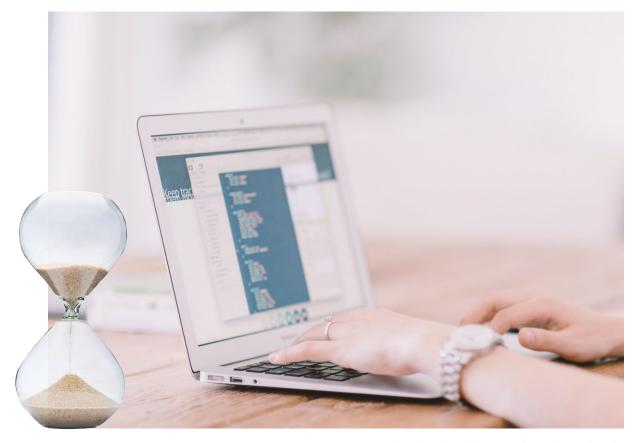Achieve collaboratively what you could never achieve individually.

What does it mean to *manage*?

Guide

Your team

To achieve results

This work takes time!!!

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Road Map

1. Prepare to manage

2. Assess your team

3. Communicate expectations

4. Commit to giving feedback

Setting the Stage:
A Tale of Two Employees

Sandra is a manager in the corporate communications department. She was hired specifically to manage the company's social media presence. Her background is in event-planning, but she decided to move into social media work because the hours are more predictable.

- o Sandra has one direct report (a communications coordinator), who "loves working with Sandra"

A few performance issues have come up in Sandra's first 18 months:

- o Sandra has retweeted a few questionable tweets that caused controversy within the organization
- o She still has not developed a social media strategy in spite of working at the company for over a year, and
- o She refuses to update the company's Facebook page because she believes "no one uses Facebook anymore"
- o Other members of the communications team have reported that Sandra is "constantly asking for help" and relies on them "to do her work"

Sandra is 35 and had a new baby just before accepting this job. She has been out at least 10 days in the past six months, mostly for appointments related to her daughter, and a few other things that no one can remember.

Setting the Stage:
A Tale of Two Employees

Andrew is Sandra's boss. He has been at the company for many years and is well regarded as a "great guy to work for."

- It is important to Andrew to be well liked by his team, and he works hard at that.
- Andrew took a chance on Sandra because he liked her "energy" throughout the interview process. He thinks she can learn how to handle social media effectively, and is eager to see what she can do.
- Andrew has 4 kids and understands the demands on a new mother. He is willing to be flexible with Sandra's schedule.

Andrew has heard a few complaints about Sandra, but thinks people are being too harsh on this relatively new employee. He is inclined to ignore these complaints for now (he hates it when people are negative) and give Sandra a chance to settle in. He is confident she will pick up what she needs to learn.

Step 1: Prepare to Manage

Know yourself

Know your employer

Know your team

Know Yourself

How do you feel about being the boss

- Fully embrace and eager to learn
- Exhausted and wish everyone would leave you alone
- Insecure about your ability to make decisions or your own role
- Love the authority and defensive about any feedback directed at you

Communication/ learning style

- Prefer written communication or in person
- Learn by doing or follow instructions
- Introvert vs extrovert

Know Yourself

How important is positivity

- Reject "whiners"
- Ignore complaints
- Love to wallow in life's problems

Conflict

- Avoid at all costs?
- Thrive in chaos
- Somewhere in between

Know Yourself

- Regularly take stock
  - › How are you doing as a boss?
  - › Is your team achieving results?
- The way you treat people determines whether you'll get their best effort, a perfunctory effort, or an effort to sabotage you
  - › In other words, whether or not results are achieved starts with you!

Know Your Employer

- What is the scope of your authority?
    - › Do you determine performance rating
    - › Do you determine merit pay/bonus
    - › Do you control training/resource budget
    - › Do you control the structure of your team
    - › Don't forget to seek buy-in if needed
- What processes/policies are you required to follow?
    - › Performance evaluations/PIPs/feedback forms
        - Actively engage in these processes!

Know Your Team

- Who did you choose?
- Who did you inherit?
- Does that matter to you?
- What do you know about them as individuals?
  - › What motivates them
  - › What are their long-term goals
  - › How do they derive meaning from their jobs
- Do you have favorites?
  - › What makes someone a favorite?
- It is important to care about the people who report to you!
  - › And remember – they have lives outside of work that are important, too
- Be conscious and intentional!

Andrew and Sandra

Andrew doesn't like negative people

- If he sees complaints as negativity, he will overlook legitimate concerns – potentially for too long
- He will need to train himself to really listen to complaints and take action when necessary

Andrew wants to be well liked by his team

- May be too permissive with leave/ignore the need to follow policies related to leave
- May be slow to address problematic social media posts or failure to complete the strategic plan

Andrew likes positivity and may have overvalued that attribute in the hiring process

Step 2: Assess Your Team

- Goal: put the right people in the right roles
- Building a team is hard!
- Rock stars vs superstars
  - › You need both
  - › Focusing all of your attention on the most ambitious people hurts the people who are doing really good work and are happy to keep doing it
- Ask yourself – have I given everyone opportunities that are in line with what they really want?

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Assessing Your Team: What to Consider

- What do *you* see as their strengths and areas for improvement
- What do *they* see as their strengths and areas for improvement
- What training/resources do they need
- How do their skills align with the job requirements
- What are they contributing to the team beyond their skills
  › Great attitude/brings people together/cheerleader for the company
  › Willing to do anything/very flexible/adapts to change easily
  › Negative, constantly complains, wears everyone down
- Perfection is not a reasonable expectation!

Assessing Your Team: Best Practices

Don't tolerate brilliant jerks (Netflix)

Think team, not family

You don't have to be stuck with someone who can't do the job

Don't give up too easily – training goes a long way!

Check for bias, retaliation, unlawful considerations

Andrew and Sandra

Andrew should be assessing Sandra's skills in connection with the social media position

- Identify what it takes to be successful (e.g., strong writing skills, knowledge of social media platforms, strong understanding of the company, etc.)
- Does Sandra have those skills? How should Andrew determine this?

Given Sandra's lack of relevant experience, a training plan is necessary

- To be an effective manager, Andrew should develop and then execute the training plan
- Goal is to ensure that Sandra is set up for success

Step 3: Communicate Expectations

- Identify the results to be achieved
  - › Get clear about the goals
- Clear communication about expectations is your responsibility
  - › Provide tools necessary to do the job well
  - › People cannot read your mind – really, they can't!
- Review job expectations – are they reasonable/doable?
- Don't forget to check for understanding

Assigning a Project: PDQ

Consider including the following when assigning a project:

- Purpose
- Directions
- Questions
  - "what are your questions" instead of "do you have any questions"

Andrew and Sandra

Andrew is responsible for Sandra's work

- Waiting to see if Sandra can figure it out on her own is a management failure

Andrew should clearly identify what is expected

- Is FB part of the Company's social media approach? If so, Andrew must insist on Sandra maintaining FB until a new strategy is approved
- Is there a mechanism for having posts reviewed prior to publication? Following publication?
- When is the overall strategy supposed to be completed? Is it entirely up to Sandra to complete?
- All of these details should be conveyed (preferably in writing)

Setting Expectations for Sandra

- "A big priority over the next two months is finalizing the social media strategy. We need you to identify the top 3 platforms you think we should focus on and identify a plan for each. Please include the following:
    › What content is appropriate for which platform?
    › Who is responsible for generating the content?
    › What is the frequency of use of each platform?
    › How will we measure effectiveness of this plan?
    › Prepare a budget with an estimate of the costs associated with each platform.
    › The deadline for this project is DATE. Please check in with me in XX weeks with an update."

Step 4: Commit to Regular Feedback

- Build your own credibility day by day
  - › Demonstrate expertise
  - › Show your work
  - › Don't waste your team's time
  - › Keep the dirt under your fingernails
- Offer a balance of praise and criticism
  - › Tell people when their work is right/great
  - › Tell people when **their work** isn't good enough
    - • Care enough to tell people when things are not going well
- Make it acceptable for people to give you feedback, too -- "What can I do or stop doing that would make it easier to work with me?"
- Both informal and formal feedback are important!

Nuts and Bolts of Feedback
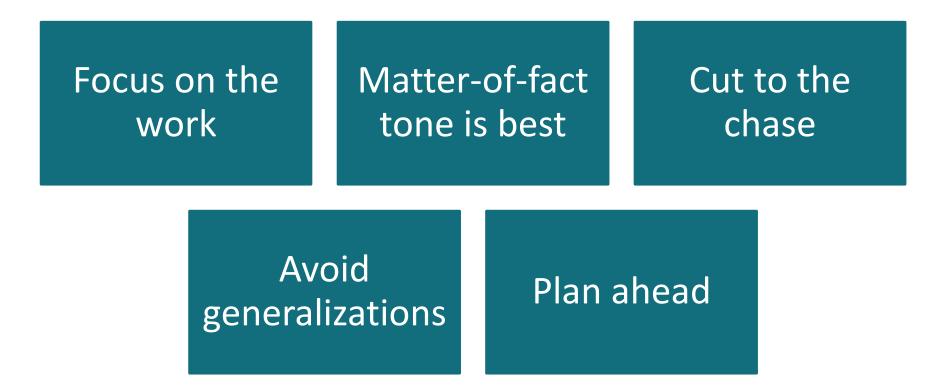
Situation

- Explain the context

Behavior

- What was the good or bad behavior

Impact

- What impact did you observe

Feedback Tips

Focus on the work

Matter-of-fact tone is best

Cut to the chase

Avoid generalizations

Plan ahead

Example 1

Someone grabs the parking space you have been patiently waiting for.

Feedback options:

1) "You a**hole – that is MY spot!"

2) "I've been waiting for that spot here for five minutes (*situation*), and you just zipped in front of me and took it (*behavior*). Now I'm going to be late (*impact*)."

Example 2

You ask a report to prepare a slide deck for an important meeting with the entire finance department to explain a new accounting process. The deck was finished only a few minutes before the meeting, had numerous typos, and omitted a chart that explained the reason for the accounting change.

Feedback Options:

1) "Next time, get the slides to me the day before the meeting so that I can fix the typos."

2) Say nothing, but next time, you just quietly give that project to someone else on the team.

3) "I was excited to give you the opportunity to run with this project and present in front of the entire department (*situation*). It looked like you did not give yourself enough time to proofread the slides, and you omitted an important aspect of the material (*behavior*). Now, the reason for the change is not as clear and we saw much more resistance to the new approach than we anticipated (*impact*). What happened?"

Best Practices

Understand how others experience your guidance

Praise in public, criticize in private

Listen with intent to understand, not respond

Give timely feedback

Always include "how can I help?"

Don't forget to document the feedback you give

Tone Matters

- Importance of civility
  - › Everyone wants to be treated with respect
  - › Many people shut down when they feel they are being yelled at
- Positional power affects tone
- Beware of your own discomfort
- Ask questions and listen to the answers
- Assume the best . . . not the worst

Manage Meetings

- Create a culture of listening
  › Employees listening to each other instead of grandstanding
  › You listening to reports instead of lecturing
  › Ask questions and listen to answers
- Actively manage meetings to ensure everyone participates
  › If necessary, go around the table to ensure everyone is heard
- Use public praise to guide behavior
- All of this is feedback!

Manage Emotions

- You cannot prevent, control, or manage other people's emotions
  - › But, you can and should acknowledge them and react compassionately when emotions run high
  - › You can manage your reactions to other people's emotions – work hard at not being defensive or pre-emptive
- Examples:
  - › Avoid "don't take this personally," "don't be sad," "no offense, but …"
  - › Instead "I can see you're mad/frustrated," "I am going to step out for a minute and get you some water"

Practice Being Direct

<u>Employee seems disengaged</u>:

- "What are you working on that you don't want to work on?"
- "What can you do to stop working on it?"
- "What are you not working on that you do want to work on?"

<u>Employee is not clear in discussing new idea</u>:

- "I think you are on to something, but it's still not clear to me. Can you try explaining it again?"
- "I understand what you mean, but I don't think others will. How can you explain it so it will be easier for them to understand?

Preparing to Give Sandra Feedback

Andrew's Contributions to Current State
• Hiring decision
• Did not give Sandra clear expectations
• Hasn't held Sandra accountable
• Hasn't set Sandra up for success (i.e., training)
• Hasn't provided ongoing feedback
• Empathetic in an unhelpful way
• Prioritizes being liked

Sandra's Contributions to Current State
• Underperforming
• Not taking initiative to learn her role
• Hasn't developed a social media strategy
• Has others do her work
• Lets personal belief impact action
• Numerous absences

Feedback for Sandra

- Possible feedback, depending on how she is doing:

  "Thank you for your draft of the social media strategy. This is well written and includes a good discussion of the merits of each platform. However, this draft does not include any discussion of the content anticipated for each platform and also does not indicate who is going to generate the content. What resources would be useful to you as you fill in those gaps?"

- Logistics
  › Deal with everything at once?
  › PIP?
  › Who participates?
  › Goals?
  › Follow up?
- Is there hope for Sandra?
- What about Sandra's absences?

Formal Feedback

- Follow your employer's processes
    - › Be timely, thorough, and honest/accurate
    - › Must be written
- NO STRAY REMARKS
- If you avoid doing this hard work, you are letting down your reports and your employer – and potentially creating legal exposure

Final Thoughts

- Clear communication is a core competency for supervisors and managers
- Remember that employees want to be successful
  › If you set expectations and give clear feedback, it is more likely that they will be successful
- If you are not quite sure what you need someone to do differently, spend time figuring that out first
- Not everyone can do every job – even if they really want to!!

Presenters

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