Ask Andi
Trusted Advisor to Business Owners

Promoting & Training Employees

09/04/06

I have promoted a really good employee to a management position. I have also hired someone to take his old position. How do I go about training both individuals? The management position is relatively new. He has lots of potential, but has no managerial experience. What should I do?

First of all, congratulations! Promoting from within has a lot of advantages. You have a manager who already knows the lay of the land. He probably understands many of the technical aspects of the job he'll now be supervising. And he already has working relationships with peers and subordinates.

Let's start by looking at what you'll have to do to get the promotion off the ground. You'll want to pave the way for the new promotion, and train that person to manage people effectively. Then we'll talk about insuring the new replacement hire has the best opportunity to succeed. In the case of the replacement, that will include insuring he or she is trained, has success measures and follow up routines.

Let's get started! When promoting from within, be sure to gear up everyone in the organization for a successful transition. You want to be clear as to the changes you're making. Take the time to be clear as to why the changes will be for the better, and how this person is best qualified for the new position.

Don't keep the organization in the dark, as that will only add to confusion. Provide lots of information as to what the transition will be like. Include information about when the transition will take place, how the old position will be covered until a replacement is found, and to whom the new and old positions will report.

Communicate both verbally and in writing. Consider a company wide memo if the change affects a lot of people throughout your organization. Use a department specific memo if the changes are limited to only one department. Make it clear that you expect everyone to accept and support the changes.

Here's an example of a memo that was used to make the announcement of a promotion. "After careful consideration, I have decided to make the following changes in the organization. As of Monday, September 20, Bobbie will be in charge of both Sales and Customer Service. As you all know, Bobbie has done an excellent job in Customer Service over the past year. That experience, combined with Bobbie's previous background in sales, I believe, demonstrates that Bobbie has the right credentials to tackle this new, important assignment. Bobbie's old responsibilities in customer service will be jointly covered by Bobbie and our other Customer Service person, Alex, until Bobbie's replacement is hired. In the new assignment, Bobbie will report directly to me, and both Customer Service and Sales will report through Bobbie to me. Please join me in wishing Bobbie well with this new assignment, and provide Bobbie with your full support as we go through this transition."

Spend time with your supervisory staff and line managers, discussing the transition. Introduce the new manager to the team. Make sure everyone understands and supports the change. Monitor interactions among the managers for the first 90 days, possibly holding management meetings more frequently than usual, to be sure that everyone gets off on the right footing.

Once your new manager is in place, you need to train him or her to manage people. Remember that being good at doing a function, or a series of tasks, is very different from managing other people to do those same functions or tasks. This is about helping your new manager build a whole new set of skills.

Be sure your new manager knows what resources he or she can draw upon, and how to do so wisely. Spend time with the new

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manager, talking about the new job, how it will be different from the old job. Find out what if your new manager has any concerns, as he or she faces this transition. Ask your new manager to describe what he or she thinks will be easy, and hard, and where help will be useful.

Discuss the role of management, and how that is different from doing. Talk about the roles of delegation, teaching, and oversight. Emphasize that he or she will have to put employees in charge of their own success, motivate people to perform, recognize where people are stuck, and reward and encourage progress.

One of the big mistakes that new managers often make, when promoted from within, is to step in and start taking over when problems happen. Talk to your new manager about the importance of helping direct reports to succeed and learn, and that that is best done by oversight, not be stepping in and doing things over. Be sure your new manager understands that you expect leadership, and also expect mistakes – so long as people learn from their mistakes and make progress. Emphasize that in the new role, teaching will be as, or more, important as doing.

Encourage your new manager to build a team of people. This can be done by having a whole department meet to discuss goals, ways to accomplish goals, and ways to work through problems. New managers can often be unsure of themselves in the beginning. That can make it harder for them to encourage group participation, as they may fear loss of control, or may not want to look like they don't have all the answers. Tell your new manager that it's more important to get people involved with him or her, than it is to have all the answers. In fact, people will probably come to appreciate the new manager more if they feel the manager is soliciting opinions and asking people to be involved.

If employees try to go around the new manager and come directly to you, send them back. Don't under-cut your new manager. Even if you have the answers, resist the temptation to help out; instead teach people to work together by encouraging them to go through the new manager. If you think there's a problem, go back to the new manager with the employee in tow, and help them talk through whatever the situation or question is, sticking around long enough to be sure it's resolved. If there's a problem, take the manager aside, and discuss it one-on-one, not in front of the employee.

Now let's talk about filling the manager's old slot. In this case, our read says that a replacement has already been hired. Great! That means you can probably skip the next 2 paragraphs. For the rest of us, who will be going through the process of promoting and then filling the open position, read on.

Make sure that you hire the right person to fill the open job. You can do this by taking a look at what the old job had been about, and how you want to change it in the future. Once you have re-defined the new job, write up a brief job description, and make a list of attributes and skills needed. Post this internally, so that people inside the company have an opportunity to pursue a promotion, if they are interested. And, start your search externally by placing a job ad.

As you look at candidates, don't rush into hiring and make a mistake. If you're not seeing what you want, change the ad, place the ad in other locations, and consider bringing in a temporary employee through an agency. Do what you have to, in order to buy time to get the right person in the replacement position. In the interviewing process, involve the manager who was promoted out of that position, since that person probably has the best feel for what it will take to do that job well.

Once you have a candidate to fill the empty position, follow steps similar to those you used to introduce your new manager. Let people know the new person is coming on board, and that you

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expect everyone to welcome and support them. Define goals and expectations, a training program, and a timeline. Be clear who this position reports to, and check in regularly to see that both new employee and manager are getting off on the right footing.

Have someone assigned to orient the new person to the company. You need people in charge, to oversee everything from filling out new hire paperwork, to including the person in lunch breaks, to answering questions about how the company works. If you don't have a personnel department, which most small companies don't, you can assign these responsibilities to different people in the company. You may want someone who is good at documentation to own the responsibility of getting the new hire paperwork completed, for this employee and for any others you may hire in the future. Have someone you trust, who you believe is well known and good at looking out for people, act as the new hire's shadow, doing introductions and answering questions.

In this case, it seems likely that the new manager will be supervising the new employee, since this manager is now going to be in charge of a job that he or she used to perform. If this is the case for your company, you need to check in and be sure the new manager is getting the new employee up to speed.

Sometimes new managers have trouble letting go of old jobs, finding it easier to step in and do, rather than train someone else to do. If you see this happening, you have to take the new manager aside and discuss the situation. Emphasize that the new manager can't do both jobs – old and new – and that their only hope of succeeding is to help the new employee get up to speed on the job the manager used to perform.

In all cases, be sure that you, your manager, and the new employee all agree to measure results. Be sure you're all clear as to what specifically is expected, and by when. If they are on track, keep going. If you find glitches, be sure the manager and employee stop and address them, including reaching agreement as to how training will be adjusted until the glitches clear up. Check regularly on how results are being measured, to be sure that everyone is on track.

Looking for a good book? Try Systematic Succession Planning, Building Leadership from Within, by Sandy Pokras.

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If you are a business owner and you have a question or would like to discuss some aspect of your business, call 1.877.238.3535 or send an email to AskAndi@StrategyLeaders.com.

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