

# The Great Managers Playbook



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## Why does this playbook exist?

Companies increasingly rely on managers to drive employee results and engagement. At the same time, being a manager is getting harder. In the midst of societal and economic tensions, today's managers lead teams that are more diverse, distributed, and demanding than ever before. The result of this strain is employee underperformance and attrition, along with manager burnout. It's already a problem, and it's only getting worse. But it doesn't have to be that way.

At LifeLabs Learning, we've studied and taught more than 100,000 managers at over 1,500 of the world's leading-edge companies (like Reddit, TED, Slack, and The New York Times). We've gotten to see what separates successful managers from those who buckle under the pressure and bring their team down with them.

This playbook captures our most essential lessons learned about the systems, tools, and skills that distinguish companies that are catalysts of manager excellence.

## How can you use this playbook?

- This guide is yours to use for free with no attribution required to LifeLabs Learning. We believe this information is too important to keep to ourselves.
- Please share it freely on LinkedIn and with companies and teams who can benefit from it.
- To equip you with the most timely and relevant tools, we will release this playbook in three parts:
  - Part I: Manager Role Design & Selection
  - Part II: Manager Development
  - Part III: Org Systems & Resources
- Sign up here to get each part as soon as it drops.
- Let us know your top questions to address or tips to add here!
- To launch a rapid skill-building program for your managers, contact us at [LifeLabsLearning.com](https://LifeLabsLearning.com)

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## INTRODUCTION

### 1. Why Managers Matter

While there are many systems companies can put into place to help their employees achieve results, managers are a uniquely powerful “system” for enabling high performance. Managers are like a lever – a small input that can yield massive output.

What is it about the manager role that makes it so well-poised for impact? Only managers are able to address the unique needs of individual employees. They offer a personalized approach that a company as a whole cannot – especially at scale. Imagine a group of Olympic athletes training to win. Sure, they can all watch the same instructional videos, but nothing can compare to the impact of one-on-one and team-level support. The result of this model is that managers have a disproportionate impact on performance, engagement, inclusion, and culture.

Managers also serve as a communication hub for the organization – tailoring broad org-wide messages to their teams and sharing team-level insights with company leadership. This ‘hub effect’ is a must-have at a time when companies must stay nimble to survive.

### 2. The Urgent Problem

Leaders at nearly every company we’ve served believe that managers matter, but few believe that their managers are highly effective. According to Wigert and Harter (2017), bad management costs roughly \$7 trillion globally every year. And only 20% of employees strongly agree that their manager motivates them.

What’s more, managers themselves are feeling the weight of their growing tactical and emotional responsibilities. Since 2020, our clients have cited burnout as one of the biggest threats for managers and the companies that rely on them. We’ve seen a renewed concern about manager burnout since April of 2022. What is causing this widespread crisis in management? We believe that the root of the problem lies in the fact that companies don’t know how to equip their managers to succeed.

#### The most common critical gaps in manager support include:

- **Alignment:** Lack of clarity on the manager role, expectations, and success measures.
- **Capacity:** Lack of time built into the role to do the job well.
- **Selection:** Lack of effective practices to hire well for the role.
- **Assessment:** Lack of clear and timely input to course-correct poor management.
- **Development:** Lack of awareness of essential manager skills and how to gain them.
- **Systems & resources:** Lack of organizational systems and support that enable managers to be effective in their roles – with many common people processes and policies actually causing more harm than good.

### 3. The Revolutionary Opportunity

Despite the fact that managers all around the world are in trouble, we have seen first-hand that small changes make a big impact, fast. The return on investment in managers is significant.

Companies that take a strategic approach to ensuring their managers succeed see the payoff in performance and engagement and also play a vital role in creating the future of work. Put simply, it should not be the norm that managers are exhausted by their work and that employees dread working with their manager. Today, more people than ever have the unprecedented opportunity to unlock the full potential of their talents and passions through their work. Managers can be the obstacle to this workplace revolution – or the catalysts.

Throughout the rest of this playbook, we will share the most reliable and practical resources we've found to unlock the power of your managers.



## PART I: ROLE DESIGN & SELECTION

### 1. Manager Definition

#### A. What a manager is:

Over the years, we've been surprised to discover that the managers we teach and the companies we serve can rarely articulate what a manager actually is. Imagine if the same were true for other high-impact professions such as pilots, surgeons, salespeople, or engineers.

A simple and powerful fix is to deblur the meaning of 'manager' for all employees, including your managers.

#### Here is a sample definition you can use as your starting point:

*The purpose of managers at [Company] is to be our multipliers. It's a role that exists to help people achieve more than they could do on their own. The manager role is designed to accelerate results and do so in a way that each person finds rewarding.*

#### B. What a manager is not:

Given the rapidly changing nature of management and the differences in this role across companies and teams,



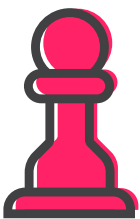
**Pro-tip!** If your goal is to build a culture of high performance, engagement, and contribution, we strongly encourage clarifying that it is a manager's job to manage resources and not to manage people. Not only is it universally demotivating to feel "managed," but it's also impossible to truly control people's actions and outcomes.

we've also found that managers and employees benefit from understanding what a manager is not.

Great managers contribute to outstanding results by catalyzing rather than attempting to control people's behavior. Their goal is not to ensure that the work gets done but to ensure that the people doing the work have the skills, knowledge, connections, and support they need to (a) do the work well today and (b) build capacity to do great work in the future.

#### Here is a sample clarification you can use as your starting point:

*Managers at [Company] are responsible for managing goals, time, resources, and budget. They do not manage people. We believe each of us has a responsibility to manage ourselves. That means that we take personal responsibility for our own performance, growth, and engagement. We lean on our managers for guidance, feedback, and coaching. They are not here to make sure we do our work but to make sure we have the feedback, resources, and support we need to achieve our results.*



#### MANAGER DEFINITIONS NEXT STEPS

- Do a quick alignment audit. Ask 5-7 employees across your company to briefly define the manager role at your company.
- If there is widespread clarity: hooray! Be sure the definition is captured in your hiring, onboarding, assessment, and development materials, and give yourself a high five.
- If the meaning of "manager" is blurry, propose a definition and gather input from a diverse group of employees. Ask: *What is clear about this definition? What is unclear? What is missing or misaligned with your definition? Then share it broadly.*

## 2. Role Description & Success Metrics

### A. Role Description

Beyond a big-picture definition of what a manager is (and isn't), you can rapidly achieve greater alignment by sharing a role description with your managers and all employees.

**Here is a sample manager role description template you can use:**

**Title:** Manager [*alternative titles to consider: Sponsor, Coach, Lead*]

**Purpose:** Equip your team to achieve great results while building on their strengths. Assess your team's results to celebrate progress and address problems early.

**Time allocation:** Expect to allocate approximately 2-4 hours per week, per team member to this role.

### Responsibilities:

- Model and reinforce a dedication to our mission, vision, and values.
- Monitor and support inclusion to ensure that each individual on your team has access to information, support, connection, and opportunities to contribute.
- Help each team member solve challenges, identify priorities, and remove obstacles to their efficiency, effectiveness, and engagement.
- Encourage and support deliberate development through coaching, feedback, teaching, reflection, recommending resources, and making introductions.
- Ask for feedback on how you can better support your team members.
- Assess team member results to achieve alignment, celebrate and build on successes, and flag problems early.
- Diagnose gaps between goals and results (considering the impacts of the individual, team, and company on individual performance) and help create a plan to close those gaps. Clarify the results and timeline required, resources available, and consequences of missing goals.
- When needed, contact your People Ops Partner to create performance improvement plans and employment termination evaluations.
- Communicate company-wide priorities and help team members set and track goals that link up to these priorities.
- Provide clarity on responsibilities, processes, and policies. Serve as the first point of contact for all questions and issues pertaining to their role.
- Provide insights and recommendations to the leadership team and your People Ops Partner on what's working and what can be improved on a company level.

### B. Success Metrics

Once the responsibilities and commitments of the manager role are clear, it's critical to create and communicate success metrics. These can be part of the role description and/or captured elsewhere in a spot that is easily accessible by managers and their teams.

**Here are some sample manager success metrics:**

- X% of team members meet their success metrics on a monthly basis or have a performance improvement plan in place.
  - **Why this metric?** *Our success metrics are an early indicator of whether we're on track to reach our goals. Monitoring this metric allows you and your team to catch and address problems early and celebrate success.*
- X% completion and on-time-rate of manager standards: weekly one-on-one, monthly metrics checks, quarterly celebrations and strategic planning.
  - **Why this metric?** *These behavioral standards are the best predictors of great team outcomes. While you can't take total responsibility for your team's performance and engagement, you do have full control over your commitment to our company-wide manager standards.*
- X% of team members agree with each of the following engagement survey questions, as measured in our quarterly survey:
  - I know what is expected of me at work.
  - I have the resources I need to do my work well.
  - At work, I have the opportunity to do what I do best every day.
  - In the last 7 days, my manager has recognized me for doing good work.
  - My manager seems to care about me as a person.
  - My manager encourages my development at work.
  - When I share my thoughts with my manager, my opinions seem to count.
  - In the last month, my manager has talked to me about my progress.
  - In the last three months, I've had opportunities to learn and grow.
  - **Why these metrics?** *Gallup's global research has found that these questions are significant predictors of engagement and performance.*
- Other metrics to consider: speed to results, % of goals achieved, employee retention, customer satisfaction, manager self-assessment, and manager 180- or 360-degree assessment.

Good metrics must be *measurable* with at least some degree of objectivity. They should ideally combine *input* measures that managers can directly control (e.g., holding weekly one-on-ones) with *output measures* that can influence through their efforts (e.g., engagement). They should be sensitive enough to catch problems early. And there should be a small number of metrics to measure so that managers can prioritize their efforts and energy. Three key metrics consistently tracked will yield better focus and outcomes than many messy metrics.

**Questions to guide you and your team in setting good metrics:**

- *What results would show us that managers are fulfilling the purpose of their role?*
- *What or who is best poised to assess their results or work quality?*
- *What indicators can help us catch and address problems early?*
- *If someone were a truly great or very bad manager, how could we tell?*
- *What results are within the manager's control? What results can they influence?*



### C. BONUS - Role Authority:

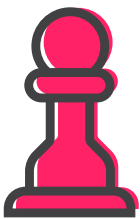
Before wrapping up your role descriptions, consider whether it would help to make authority levels explicit as well. What do managers have the power to decide on their own? What requires collaboration? Some companies clarify role authority to avoid miscommunication. Others also use this section of the role description to deliberately distribute power.

#### Sample manager authorities (as a manager, you have the authority to):

- Use your funds as you see fit, so long as it is within your budget.
- Set your team mission, vision, strategy, goals, workflows, and project timelines so long as they are in alignment with company goals and policies.
- Decide on work hour constraints, if any, for your team —as long as a 32-45 hour work week is the norm.
- Recommend a performance improvement plan or employment termination plan for anyone on your team — with all final decisions requiring agreement between two evaluators and a tie breaker, if needed.
- Make hiring decisions for your team, with at least one other decision-maker and a tie breaker, if needed.

#### Sample employee authorities (the people on your team have the authority to):

- Use their PTO benefits as they see fit, as long as they alert you and enable others to provide coverage for their tasks.
- Attend all company events, such as skill-building workshops and Employee Resource Group meetings.
- Work from anywhere that provides strong internet coverage and an environment that does not create distractions for others.
- Present their ideas and feedback to anyone at the company, including their manager's manager.
- Request a different manager if they feel there is a bad fit.



#### MANAGER ROLE DESCRIPTION NEXT STEPS

- If you do not have a manager role description and/or success metrics, use the template we've provided and tweak it to represent your company's expectations. Be sure to gather input from a group of folks with diverse roles and identities.
- Make the role description easily accessible, particularly during hiring, onboarding, and any performance assessment periods.
- If you already have a role description and metrics, go you! Ask 5-7 individual contributors and 5-7 managers what they find most helpful and most confusing about it. Use their input to clarify the role. Make sure the description is easily accessible.

### 3. Manager Standards

In addition to providing a clear role description, we've found that companies with the strongest managers went one step further. They crystalized a small number of behavioral 'standards' that all managers, including executives, commit to upholding.

These standards transform broad accountabilities like "providing support and development" to specific, observable behaviors like holding weekly one-on-ones with each person on the team.

#### Pro-tips to make your manager standards work for you:

- Pick observable behaviors. Managers and teams shouldn't have to guess whether they are sticking to the standard. A binary behavior like "have a career planning conversation on a quarterly basis" works best. Avoid blur words like "inspire" and "empower."
- Limit your standards to 10 max. Any more is hard to remember and track.
- Incorporate your core values. Show your managers how values look in action by linking them up to your manager standards
- Embed manager standards in onboarding. Make sure new managers see the standards early. Post them where they are easily accessible like a company wiki or intranet. Add them or link them to your role description.
- Create a self-reinforcing system. Create accountability and consistency by linking these standards to training, engagement surveys, feedback, promotions, hiring, self-assessments, and manager 180s.

#### Questions to guide you and your team in setting helpful standards:

- *What specifically do our best managers do on a regular basis?*
- *What manager actions do we see as non-negotiable?*
- *What concrete behaviors bring our company values to life?*
- *What manager routines or habits can nudge important conversations?*

#### Sample manager standards (based on LifeLabs Learning research):

FREQUENCY		
Weekly	Monthly	Quarterly
Hold 1-on-1s (weekly or biweekly)	Review individual role metrics	Celebrate past quarter & plan next quarter
Give and ask for feedback	Hold a team-wide retrospective	Update Individual Development Plans

We've seen some of our clients hesitate when it comes to articulating manager standards. They fear that spelling out concrete actions is overly prescriptive. While it's true that micromanaging managers rarely works well, we've found again and again that a small number of specific behavioral standards provides just the right combination of guidance and autonomy.

Managers who have clear standards of behavior are more confident, calm, and effective. And not only do these manager standards reduce performance gaps across teams, they also allow inexperienced managers to rapidly accelerate up the learning curve.

To gain buy-in, interview your managers to learn which of their habits have served them most and share quotes from them about why these behaviors are so important. Rather than positioning these standards as rules, talk about them as small cornerstone habits that make a big impact while making managers' lives easier. Use pilots, nurses, and doctors as analogous professions that all lean on the power of disciplined ritualized practices to achieve great results.



### MANAGER STANDARDS NEXT STEPS

- If you already have manager standards in place, give yourself a fist bump! Then review them and gather input from others to see if there is room for increased clarity.

- If you don't have manager standards, send a message to your managers that goes something like this:

*Hi [Company] managers! We know how hard your job is and are deeply grateful for your effort, talent, and care. One way we hope to make your lives easier is to be even more explicit about our manager standards: specific actions we expect you to take and the resources we provide to help you take them. Think of these as our pilot's checklist – the cornerstone habits we all commit to practice.*

*Based on research conducted by LifeLabs Learning on the habits of great managers as well as our core values, we propose the following standards... Before we finalize anything, we'd love to learn from you! Which of these standards resonates with you? Which is unclear? Is anything missing? Which habits would you most like to receive support with so it's easier to do?*

- Add the manager standards to your role description or another easily accessible location that people can see during hiring, onboarding, and assessment time.
- Do an audit of your internal systems to spot opportunities for these behaviors to be even easier and more automated. For example, share 1-on-1 templates and provide training on how to give high quality feedback.



## 4. Core Manager Skills

Despite overwhelming evidence to the contrary, many companies still operate under the assumption that people can develop manager skills “on the job.” But just as you wouldn’t throw an engineer into a job without requiring that they know your programming stack, it would be irresponsible to throw a manager into their role without equipping them with the right manager skill stack.

Experience is simply not enough. In fact, we have found no correlation between years of experience and manager skill level. Often, having more time to practice bad habits just leads those habits to be more ingrained! And even if it were possible to learn through experience, experience is an extraordinarily costly teacher when the risks are underperformance and attrition.

Companies with the most consistently effective managers take the time to understand and articulate the skills that matter most.

The good news is that LifeLabs Learning has done the research to identify the manager skills that make the biggest difference in the shortest time. We call these core skills. Best of all, we’ve found that there is a small set of ‘tipping point skills’ that tip over into a wide range of situations. Think of these skills as primary colors. While there is a small set of them, they mix together to create an infinite array of other skills — helping managers tackle any challenges they face.

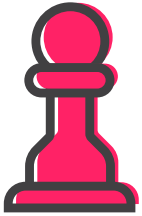
### The manager skills that matter most:

- **Coaching:** Ask questions, help people think clearly, encourage independent problem-solving
- **Feedback:** Give praise, articulate and help close skill and performance gaps
- **Productivity:** Help set and track goals, set priorities, improve effectiveness and efficiency
- **Effective one-on-ones:** Develop relationships, eliminate obstacles, catch engagement issues early, address individual needs, help people feel heard and valued, build belonging
- **Strategic thinking:** Create strategic alignment, anticipate and mitigate risks, involve the right people at the right times, show people how their tasks link up to organizational goals
- **Meetings:** Ensure all voices are heard, catalyze creative thinking, facilitate high quality decision-making, run engaging and productive meetings, eliminate time wasters
- **Leading change:** Earn buy-in, ensure adoption, help people stay nimble and resilient
- **People development:** Anticipate skill gaps on the team, support individual development plans, encourage job crafting, build a team of complementary strengths

Increasingly, we’ve also found that managers need support applying these skills through the lenses of **adaptivity**, deliberate **inclusion**, and **remote** or distributed work.

Given our extensive research and meta analyses of other studies, we feel confident recommending these skills as the core competencies of the manager role. It pays to pause and consider whether some skills are irrelevant or missing given the nature of your managers’ work. Just avoid the temptation of listing every skill you can think of. We’ve found that a long list of competencies tends to result in overwhelm when it comes to both learning and assessment. A strategy of depth over breadth tends to result in better results and higher manager engagement.

Once you've landed on a short list of core skills, make them visible and accessible to all managers as well as employees who might be interested in the manager path. They can serve to set expectations as well as inform your capacity planning, selection, development, and assessment strategies. More on those areas up next!



#### CORE MANAGER SKILLS NEXT STEPS

- If you already have a list of manager skills, pat yourself on the back! Then review the list to see if it contains the core skills we listed above.
- Next, see if there are any opportunities to prune the list. Ask: Which skills are just an offshoot of another skill already on the list? Which skills are nice-to-have but not essential? Which skills are absolutely essential to achieve great results at our company? If you don't have a list, start with the core skills we've outlined above.
- Be sure to make this list accessible to prospective and current managers.
- If you want help identifying the core skills that are most relevant to your managers or devising an upskilling program, contact us at [LifeLabsLearning.com](https://www.lifelabslearning.com).

## 5. Capacity Planning

Once you have a decent idea of your manager role requirements, success metrics, authorities, standards, and skills, you can step back to see whether you have carved out sufficient time for your managers to actually do their jobs well.

Capacity planning is an area in which too many companies fall short. Not only do most managers lack the physical time to accomplish the responsibilities of their role, this lack of time forces them to make tradeoffs that result in even greater time scarcity in the future. We think of this vicious cycle as 'capacity debt.' For example, managers who lack time to develop their team pay for it with "interest" when their team members become disengaged or quit because they don't feel they are growing.

Once you know the required role capacity, you can set clear expectations and make rapid, well-informed decisions about how many managers you'll need to hire to achieve certain results or support a given number of employees.

#### Here is how you can determine the capacity your managers need:

- **Conduct a time audit.** Ask at least 20% of your managers to track where their time goes for at least one typical week. Be sure to recruit managers from different departments and with different backgrounds. Offer a template spreadsheet like the one below to make it easy to mark down different types of activities.
- **Set a time allocation.** Based on your findings, come up with an approximate amount of time you will set aside for managers to do the manager part of their job. Be sure to include a 20-30% buffer so there is sufficient elasticity in your system to respond to unexpected emergencies that require an amping up of time. Factor in your PTO allotment. On average, we've found that managers require 2-4 hours per week per direct report. It's okay to start with a rough estimate as long as you set expectations that this allocation will likely change as you build more efficiencies into the role or add responsibilities. Record this time allocation in the role description and any spots that inform your hiring decisions.

- **Make adjustments.** If you discover that some managers have too much or too little capacity, make changes to create the right balance. For example, assign fewer direct reports or projects to managers who have hybrid ‘player-coach’ roles. Once again, this is a good time to remind people that these changes may be temporary and are a work in progress. Moving forward, as you increase efficiency (e.g., automate onboarding) or add on expectations (e.g., request that all managers attend weekly cross-functional meetings) re-adjust the allocation accordingly and communicate the new formula. Clarify that the time allocations are approximate and serve as a guide for managers and for hiring decisions.
- **BONUS - Clarify tradeoffs:** Even if your allocation seems perfect, your managers will invariably face instances where it’s still impossible to cross off every item on their to-do list. This tension is especially common for managers who have a hybrid player-coach role. To help your managers make good decisions in these moments, make implicit priorities explicit. For example: *if time is short, the tradeoff we expect is to help your team develop new skills even over meeting project deadlines. If you have to choose between one or the other, keep your one-on-one time sacred even over responding to email within 24 hours.*

**Sample time audit template to share with your managers:**

Mon 7/12	Time w/ directs?	Team meeting?	Other meeting?	Planning?	Non-manager work?	Other (describe)
8:00am - 8:30am	X					
8:30am - 9:00am				X		
9:00am - 9:30am						Coffee break

**Sample time allocation results tracker:**

Fixed or variable?	Activity	Length (in hours)	Frequency	Hours per month	% of month (160 hours)
Fixed	1-1 with my manager	1	weekly	4	2.5%
Fixed	Team huddle	0.5	2x per week	4	2.5%
Variable	1-1 with each direct report + prep	1	biweekly	2	1.25% x # of direct reports



**CAPACITY PLANNING NEXT STEPS**

- If you already have a time allocation you feel confident about, you get a virtual hug. If you want to create or refine your formula, start with a time audit template, and recruit 4-6 managers to pilot it.
- Refine the template as needed, then have at least 20% of all managers complete it.
- Analyze the results and create a summary of your key findings. Be sure to make your capacity formula easily accessible to managers, especially during onboarding, and to anyone making hiring decisions.

## 6. Manager Selection

With your manager definition, role description, success metrics, standards, skills, and time allocations set (even loosely!), you now possess all the puzzle pieces you need to design a high-quality manager selection process.

While we know that anyone can become a better manager through training and practice, the reality is that not everyone should be a manager. Contrary to popular perception, a manager role isn't the more "advanced" version of an independent contributor role. It requires entirely different skills, strengths, and motivators. Assuming that a great engineer will be a great manager is like assuming that a great engineer will be a great ballet dancer.

Companies with strong managers generally have an "unfair" advantage because they hire managers who already have role-relevant aptitude. In this section we'll share our favorite tips and findings on how you can do this well.

### A. Provide a realistic job preview

Many people agree to or even strive toward a manager role even though they aren't sure exactly what it entails. Help your internal and external candidates self-select in or out of your interview process by making the role as transparent as possible.

Provide a realistic job preview by sharing the manager role description, standards, skill requirements, and time allocation. If you're noticing that you are still getting poorly-matched candidates, offer other role previews such as quotes from or short video interviews with current managers on the highs and lows of the job. A few companies we studied hold monthly AMA (ask me anything) sessions with current managers talking about their experiences and daily lives.

On the flip side, be careful not to dissuade people from applying for the role just because they don't fit the typical manager profile at your company.

#### **Here is a sample application invitation we like to use in all our job postings:**

*Want to apply but not sure if you'd be the right fit? If this role calls to you, we want to hear from you. There is no 'perfect' candidate. Everyone brings something different to the team, and our diversity is what makes us strong.*

### B. Build a reliable interview process

Though you can do a lot to attract (and detract) candidates based on how you promote the job opening, it is still essential to assess those candidates using a reliable interview process.

When you simply hand someone a manager role, you are risking that they will not be good at it, and you are increasing the odds that bias has played a role in your decision-making. The more rigorous and standardized your process, the more effective and inclusive it will be.

The key to building a great interview process is to think like a scientist.

Candidate selection is the process of testing your hypothesis that Candidate X will be able to achieve Result Y. Just as in a clinical trial, for any useful data to emerge from your process, it must be empirical in the same way you would test the hypothesis that Drug X will cure Ailment Y.



Imagine if we tested drugs the way most people interview candidates. What if all patients received different doses of different drugs, at different times, with different instructions? You'd never know which drug would be more effective — or if either of them worked at all. In the same way, when assessing candidates, we have to control for as many variables as practical.

**These are the five essential steps in designing a great interview process:**

3. **Begin with the end in mind.** What are the success metrics of the manager role you are looking to fill? Will they have to achieve those results immediately or is there time for them to ramp up on the job?
4. **Outline the required skills and knowledge.** Aside from the core manager skills, are there any other competencies required to achieve the results you need? For example, should they be able to model your company values? Are there specific company policies or processes they should be proficient in?
5. **Develop your assessments.** Working backwards from your list of required skills and knowledge areas, devise ways to test the extent to which your candidates possess each competency. As much as possible, lean on assessments that let you see each skill or knowledge area in practice. Some good options include:
  - Demos (e.g., write feedback on X, create a change management plan)
  - Tests (e.g., product knowledge quiz, company history quiz)
  - Role playing (e.g., respond to frustrated client, coach a direct report)
  - Behavioral interview prompts (e.g., “tell me about a time when you...”)
  - Coworker or direct report interviews (e.g., on a scale of 1-7, how easy is [Name] to collaborate with?)
6. **Create your scoring system.** Determine how you'll assess candidate responses. In other words, what will tell you whether someone actually has the necessary skills and knowledge to achieve the results you need? Some good assessment options include:
  - Minimum passing score on skill and knowledge tests
  - Checklist of necessary criteria in a demo or interview prompt response
  - “Red flag” cues for interview prompt responses (e.g., Flag if the candidate blames or speaks negatively of former coworkers)
7. **Calibrate your scoring.** We can pretty much guarantee that you will not create the perfect scoring system. That's okay. What matters more than an iron-clad scoring system is strong calibration across your interviewers. For maximum effectiveness and bias reduction, involve a minimum of three interviewers (who ideally have different backgrounds and identities). Practice scoring sample responses until you reach 80% consistency in how you assess responses.

**Bonus:** on a quarterly or even monthly basis (depending on how frequently you hire new managers), hold hiring retros to determine whether you need to tweak your interview process. For example, ask fellow interviewers: Which interview prompts have been most and least helpful? What has surprised us? How can we improve our process to increase our predictive powers?



### Sample manager selection process:

Target result	Competency	Assessment	Scoring
90% agree: “My manager encourages my development at work.”	Coaching skills	<u>Role play</u> : 3 minute mock coaching session about workplace problem	1 point: asked about goal + 1 point: asked 3+ open questions
	Feedback skills	<u>Demo</u> : Write feedback in response to sample presentation	1 point: observation + 1 point: impact
		<u>Interview</u> : “Tell me about a recent piece of feedback you received.”	1 point: example from past 3 months

### Sample interview prompts based on core manager skills:

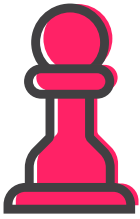
Skill	Interview prompt	Scoring focus
<b>Coaching</b>	What was a recent problem you helped someone solve? How did you do it?	Has example from past 3 months + questions vs. advice
	Imagine I’m stuck on a challenge. Can you take 3 minutes and coach me to get unstuck?	Clarifies goal + variety of questions + open questions
<b>Feedback</b>	What is a recent piece of feedback you received from someone at work?	Has example from past 3 months + applied feedback
	Share 2 pieces of positive and 2 pieces of constructive feedback on X.	Shares clear observations + impact statements
<b>Productivity</b>	What are your current priorities at work, and why are these the priorities?	Lists no more than 3 + links up to team or company goals
	Can you take 2 minutes and show me how you would delegate X task to me?	Has clear ask + gives reasoning + checks alignment
<b>One-on-ones</b>	How have you used one-on-one time to develop closer relationships with your team?	Lists 3+ examples + mentions importance of vulnerability
	Imagine I’m your report, and I cancel our one-on-ones often. Share why they exist.	Validates + asks questions + shares benefit + proposes plan
<b>Strategic thinking</b>	Describe a project your team is working on. Why did you pick this project?	Links up to goals + shares strategy + references metrics
	What risks are involved in this project? How are you reducing the impact of these risks?	Lists 3+ risks + shares mitigations for each
<b>Meetings</b>	What is an example of a meeting you improved or eliminated?	Has example + shares result of the change
	Please write a sample meeting invitation for X topic to Y group of participants.	Includes purpose + agenda + benefit statement

<b>Leading change</b>	For a change initiative you led, please describe the steps you took.	Created plan + involved others + piloted + shared small wins
	Please draft a short email to your team announcing a change in X.	Uses heart + head + urgency + validation statements
<b>People development</b>	How have you helped others learn and grow at work?	Lists 2+ examples, set goals, created plan, followed up
	How have you helped others craft/adjust their roles to better play to their strengths?	Lists 2+ examples, linked up to team or company goals
<b>Inclusion</b>	What are some tactics you have used to ensure all voices are heard in your meetings?	Lists 2+ tactics (e.g., round robins, timers, polls)
	How have you reduced the impact of bias on your decision-making?	Lists 2+ tactics (e.g., asked for input, distributed authority)
<b>Adaptivity</b>	How have you helped others adapt to change or handle uncertainty?	Lists 2+ examples, lists 2+ tactics + shares results
	Imagine a beloved coworker resigned. Please draft a short announcement to your team.	Acknowledges feelings + celebrates + focuses on future
<b>Remote work</b>	How have you made sure remote and in-person collaborators are included?	Lists 2+ examples, lists 2+ tactics + shares results
	What challenges do you anticipate remote team members having?	Lists 3+ answers, shares how to overcome the challenges

**Pro-tip – avoid these two common interview mistakes:**



- Giving away the answer. Make sure your interview prompt doesn't signal the "right answer." For example, if you are looking for a track record of collaboration, don't say, "Tell me about a time you collaborated with someone." Any answer you get will reinforce the idea that this person is collaborative and won't help you pick out the right match. Instead, think of a situation where you'd want collaboration to happen where it would also be just as reasonable to fly solo. An interview prompt like "Please discuss an important decision you made" can reveal whether the candidate tends to involve others.
- Creating barriers to entry. Gather input from a diverse group of people to double check that your interview prompts don't exclude terrific candidates with limited management experience. These accidental barriers to entry might barr fantastic candidates and reinforce systemic inequities. To avoid this problem, clarify that candidates can base their answers on experience with peers, in school, or any other groups or organizations. For example, instead of asking "What is a recent piece of feedback you got from a direct report?" ask, "What is a recent piece of feedback you got from someone at work?" Remember, when it comes to management, experience does not predict effectiveness.



### MANAGER SELECTION NEXT STEPS

- Review your current manager interview process (including the job posting, required competencies, candidate assessment, scoring, and calibration) using the LifeLabs Learning FAIR Model and look for opportunities to improve it. Be sure to ask for input from others!
  - **F**orthright: Is the job description clear? Are the necessary qualifications explicit?
  - **A**ccessible: Is everyone aware of the job opening? Have we created any unnecessary barriers to entry (e.g., years of experience)?
  - **I**nvolved: Have we gathered input on our interview process from a diverse group? Is our selection decision-making power distributed across 2+ people?
  - **R**igorous: Do all candidates go through the same standardized assessment process? Are our interviewers well-calibrated?
- Based on your assessment, tweak your interview process to increase your selection effectiveness and reduce the chances of bias leaking into your process.



## PART II: MANAGER DEVELOPMENT

In Part I of the Great Managers Playbook, we shared the fundamental steps companies must take to set up their managers for success: define the role and its success metrics, set a small number of behavioral standards, determine core skills, build in sufficient capacity, and create a FAIR and scalable manager selection process.

In Part II of this playbook, we'll zero in on how to develop your managers' skills and confidence once they are already in the role. Not only will a thoughtful development strategy result in higher manager effectiveness (and therefore better engagement, retention, and performance), it will also signal to your managers that you are continuing to invest in their growth and flourishing.

### 1. Manager Onboarding

#### A. Set expectations

As the saying goes, "expectations are the root of all suffering." Set crystal clear expectations with your managers from the beginning, and everyone will benefit.

Clarify the following 10 key items in writing even before your managers' first day in the role. Then, schedule time to review the expectations and answer any questions.

#### 10 key expectations to set:

1. What is the purpose of the manager role at our company?
2. What are their expected outcomes and success metrics?
3. How (and how often) do we measure manager success here?
4. What are the responsibilities of the role (including manager standards)?
5. What are the expected core skills of the role?
6. Roughly how much time do we allocate to various manager activities (and how we make tradeoffs if time is tight)?
7. What is the manager's scope of decision-making authority?
8. What do managers at our company not do?
9. What resources do managers have access to to support their success (e.g., tools, templates, workshops, Slack channel, Q&A doc)?
10. Who can managers turn to when they have questions or need support?



#### Important questions to ask:

- Of everything we've discussed so far, what feels most exciting/motivating for you?
- What feels unclear or a little confusing?
- What's something I can do to help you feel even just 10% more prepared?

## B. Create a cadence

Clear expectations are essential. But, sometimes, in an effort to communicate all the information, we overwhelm people or they simply forget what they learned in their first week in the role. So, great onboarding balances thoroughness with brain-friendliness by setting a good communication cadence. Here is a sample cadence that works well:

Pre-boarding:	Send welcome & expectations message			
<b>Month 1:</b>	<b>Week 1</b> - Live welcome - Expectations & resource review - Manager 1-1 - Meet team	<b>Week 2</b> - Policy & tools training / Q&A - 1-1s template & questions - Team 1-1s	<b>Week 3</b> - Policy & tools training / Q&A - Introductions - Slack invite - Listening tour	<b>Week 4</b> - Policy & tools training / Q&A - Introductions - 1 month retro
<b>Month 2:</b>	<b>Week 5</b> - Survey - Team feedback	<b>Week 6</b> - Enroll in workshops - Book - Introductions	<b>Week 7</b> - Policy & tools training / Q&A - Slack reminder - Tool / template	<b>Week 8</b> - 2 month retro - Collaborator & team feedback
<b>Month 3:</b>	<b>Week 9</b> - Office hours - Tool / template	<b>Week 10</b> - Office hours - Tool / template	<b>Week 11</b> - Office hours - Self-review	<b>Week 12</b> - Office hours - 3 month retro
<b>Beyond boarding:</b>	<ul style="list-style-type: none"> <li>• Send a final onboarding survey.</li> <li>• Check-in at the 6-month and 12-month points.</li> <li>• Pre-schedule prompts, as needed, to nudge internal rituals (e.g., quarterly strategic planning, annual career growth conversations).</li> <li>• Provide ongoing access to deliberate development (more on this below!)</li> </ul>			

### And here's a detailed overview of a sample onboarding cadence (along with some content):

- Pre-boarding (day 0):
- Send a welcome message (e.g., email, letter, video, small gift).
- Share manager expectations in writing.
- Share links to any manager resources (e.g., playbook).
- Clarify when they'll get to ask questions.
- Let them know what to expect about onboarding.
- Let them know who to reach out to for help.

**Sample message:** Hi [Name]! We're so excited for your first day in the manager role on [date]. To help you feel prepared, here's an overview of what's to come:

1. *Role expectations: Here's a link to the manager overview, including role purpose, success metrics and assessment, responsibilities, core skills, time allocation, decision-making authority, and resources we have for you.*
2. *Review session: We've scheduled a live review session of these expectations on [date and time] so you can ask any questions you'd like. Our goal is for you to feel clear and confident in the role.*
3. *Onboarding: There's a lot to take in, and we don't want to overwhelm you. So, after the review session, you can expect a drip approach to your onboarding – with small prompts popping up in your inbox once a week over the next three months. They will include introductions, tools, templates, and invitations to live training and support sessions.*
4. *Resources: If you ever have questions, the Manager Playbook is a great place to start. Your support crew is also here for you, including your manager, HRBP, and coach: [contact information]. Reach out any time you have questions or feedback. After 1-3 months in your role, you'll also receive an invitation to our awesome manager training program and a copy of a super helpful manager book called The Leader Lab.*

If I can provide any support in the meantime, please let me know!

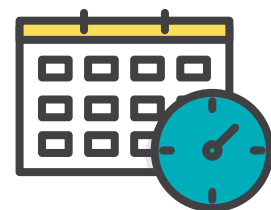
P.S. Here's a quick video from the CEO with a thank you for choosing to become a leader at [company]. We can't wait to see all the ways you impact our team.

	<b>Week 1</b>	<b>Week 2</b>	<b>Week 3</b>	<b>Week 4</b>
<b>Month 1:</b>	<ul style="list-style-type: none"> <li>- Live welcome</li> <li>- Expectations &amp; resource review</li> <li>- Manager 1-1</li> <li>- Meet team</li> </ul>	<ul style="list-style-type: none"> <li>- Policy &amp; tools training / Q&amp;A</li> <li>- 1-1s template &amp; questions</li> <li>- Team 1-1s</li> </ul>	<ul style="list-style-type: none"> <li>- Policy &amp; tools training / Q&amp;A</li> <li>- Introductions</li> <li>- Slack invite</li> <li>- Listening tour</li> </ul>	<ul style="list-style-type: none"> <li>- Policy &amp; tools training / Q&amp;A</li> <li>- Introductions</li> <li>- 1 month retro</li> </ul>

### Day 1:

Pre-schedule the following times on the manager's calendar:

- Short welcome meeting at the start of the day
- Solo time: review manager expectations
- Live session: ask questions about manager expectations
- 1-1 time with manager's manager
- Intro meeting to manager's new team(s)



### Week 1:

- Solo time: review manager resources (e.g., playbook, FAQs)
- Live session: ask question about manager resources
- 1-1 time with manager's manager to reflect on week 1

## Week 2:

- Live and/or pre-recorded training on internal policies, processes, and tools
- Prompt to schedule 1-1s with each direct report and own manager
- Recommended 1-1 [template](#)
- Optional questions and prompts to discuss in the first few 1-1s with direct reports, manager, and other collaborators. For example:
  - **So I can get to know what matters to you:**
    - *What led you to work here? For me it was...*
    - *What has kept you working here?*
    - *What's most meaningful to you about our work? For me it's...*
    - *What are your top priorities right now, and why?*
    - *What else matters to you these days aside from work? For me it's...*
  - **So we can work well together and bring out the best in each other:**
    - *Thinking back on your experience with past [managers/direct reports/collaborators], what do you find most helpful? Difficult?*
    - *What are some of your preferences around collaboration and communication? Mine are...*
    - *What are some of your communication and collaboration pet peeves or dislikes? Mine are...*
    - *What should our norms be for how we communicate (e.g., chat, Slack, email, text, respond within 48 hours, no email after 6pm)?*
    - *What's your preference for how and when we give one another feedback? Here is how I would love to get feedback from you...*
    - *What concerns you about me stepping into this role? What are you looking forward to?*
    - *What advice do you have for me now that I'm in this role?*
  - **For team: So that you are set up for success:**
    - *What questions do you have about the purpose of your role and your role responsibilities?*
    - *On a scale of 1-10, how clear are you about our definitions of success as a company?*
    - *On a scale of 1-10, how clear are you about the way success is defined for your role?*
    - *On a scale of 1-10, how clear are you about your priorities (the work that is most important to do vs. okay to pause)?*
    - *What are some of your personal development or growth goals? Mine are...*
    - *Are there any areas you're particularly eager to get feedback on? I'm always looking for feedback on...*
    - *Is there anyone on the team (or in the company) you'd like to meet?*
    - *What else comes to mind for you for how I can support you here?*

### Week 3:

- Live and/or pre-recorded training on internal policies, processes, and tools
- Introductions to other teams and collaborators
- Invitation to join manager Slack group
- Optional listening tour questions to ask manager, collaborators, and leaders in different departments. For example:

#### Questions to ask if you are new to the company:

- *How do you describe our company vision, mission, and overall strategy?*
- *How does strategy and goal setting happen here?*
- *Who are our ideal customers/users/beneficiaries? Why?*
- *What is the problem that we solve for them?*
- *Who are our biggest competitors? What makes us different?*
- *How would you describe our company culture? What do people value? What is taboo or frowned down upon here?*
- *Who has a great reputation around here? Why do you think they're seen in such a positive light?*
- *Are there any unspoken norms or rules around here that would be helpful for me to know about?*

#### Questions to ask whether you're a newbie here or not:

- *How do you define success for your department?*
- *What are your top priorities right now and why?*
- *What are some of the things that stand in the way of your priorities or make them challenging to achieve?*
- *Is there anything else that causes stress for you or keeps you up at night?*
- *Can you walk me through what a typical day and week looks like for you?*
- *How does my team's work impact your team or department?*
- *What are some things we can do to make your lives easier?*
- *How should we collaborate moving forward to set each other up for success? How should we share feedback?*

### Week 4:

- Live and/or pre-recorded training on internal policies, processes, and tools
- Introductions to other teams and collaborators
- 1 month retro with manager's manager.

#### Sample retro questions:

- *What has been going well?*
- *What has been unclear or confusing?*
- *What's something each of us can improve even by 10%?*
- *Do we have any other feedback for one another?*



<b>Month 2:</b>	<b>Week 5</b> - Survey - Team feedback	<b>Week 6</b> - Enroll in workshops - Book - Introductions	<b>Week 7</b> - Policy & tools training / Q&A - Slack reminder - Tool / template	<b>Week 8</b> - 2 month retro - Collaborator & team feedback
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### Week 5:

- Short manager onboarding survey

#### Sample onboarding survey questions (scale of 1-5):

- *How clear have you felt so far during manager onboarding?*
- *How overwhelmed have you felt during onboarding?*
- *How supported have you felt during onboarding?*
- *What aspects of onboarding have been most helpful or enjoyable?*
- *What can we do to make the manager onboarding experience better?*
- Prompt to gather feedback from team and collaborators.
  - **Sample message:** *"You've been a manager here for over a month now. Can you believe it?! We're so grateful for your effort, care, and commitment. By now we hope you've gotten to know your team, manager, and other collaborators. So, it's the perfect time to ask them for some feedback to celebrate what's working well and spot opportunities to improve."*
  - **Here is a sample prompt you can try:** *"Since we've been working together for a month now, I'd love to hear how you think it's been going. What are some things I've done that you've found helpful? What are some things I can improve or try doing differently? Is there anything we should start, stop, or continue doing in terms of how we work together? I'd really appreciate hearing your sincere feedback so we can both learn."*

### Week 6:

- Introductions to other teams and collaborators
- Announcement about the upcoming manager training program
- Book gift: The Leader Lab: Core Skills to Become a Great Manager, Faster

### Week 7:

- Live and/or pre-recorded training on internal policies, processes, and tools
- Reminder to join manager Slack group
- Optional meeting course correction [tip list](#)

### Week 8:

- 2 month retro with manager's manager
- Prompt to gather feedback from team and collaborators

<b>Month 3:</b>	<b>Week 9</b> - Office hours - Tool / template	<b>Week 10</b> - Office hours - Tool / template	<b>Week 11</b> - Office hours - Self-review	<b>Week 12</b> - Office hours - 3 month retro
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### Week 9:

- Optional manager group office hours to ask questions and get support
- Optional project planning [template](#)

### Week 10:

- Optional manager group office hours to ask questions and get support
- Optional leading change [checklist](#)

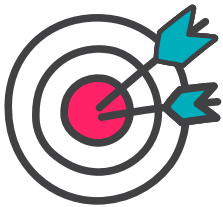
### Week 11:

- Optional manager group office hours to ask questions and get support
- Optional manager self-review prompt.
  - **Sample message:** *"It's been nearly 3 months now since you dove into the manager role at [Company]. Thank you again for your willingness to make a meaningful impact here with your leadership. Now is a great time to push the pause button and reflect:*
    - *On a scale of 1-10, how clear do you feel about our company vision, mission, strategy, and priorities? What can help increase your clarity?*
    - *On a scale of 1-10, how clear do you feel about your team strategy, priorities, and goals? What can help increase your clarity?*
    - *Who would you like to meet here or connect with more often?*
    - *Are there any meetings you want to stop, reduce, or start having?*
    - *What is the impact you want to make as a manager?*
    - *What impacts have you made in the past 3 months?*
    - *What words do you hope people will use to describe you as a manager?*
    - *What words do you think they would use to describe you now?*
    - *In what ways have you been successful in achieving the purpose of your role? (Hint: check out the manager role description for a refresher).*
    - *How would you like to build on these successes?*
    - *In what ways have you fallen short of the role purpose or metrics?*
    - *What are some small experiments you can try in the next 3 months?*



**Week 12:**

- Congratulations message on 3 months in the role!
  - **Sample message:** “Happy 3-month-aversary in your role as a manager at [Company]. You have now officially graduated onboarding! We won’t send you any more weekly messages, but be on the lookout for occasional prompts from us (e.g., quarterly strategic planning prep). If you have any questions, please remember that your support crew is always here for you: [names/contact info], and the Manager Playbook and Manager Slack group are additional great resources. Thank you for the positive impact you’ve already had here in such a short period of time!”
- Optional manager group office hours to ask questions and get support
- 3 month retro with manager’s manager



**MANAGER SELECTION NEXT STEPS**

- If you already have a manager onboarding process – woohoo! Use this playbook as an opportunity to audit it and find spots for improvement.
- If you’ve just been throwing new managers into the deep end – it’s okay! Determine which person or team at your company will be responsible for manager onboarding. Next, use this playbook and input from your managers to build a systematic plan.
- For ongoing learning, be sure to embed at least one short survey into your onboarding program so you can make tweaks for each new group of managers.
- Bonus! If you already have managers who never received formal onboarding, invite them to a “re-onboarding” experience and ask them for their feedback.

**2. Beyondboarding / Upskilling**

A clear and systematic onboarding program in a manager’s first 4-12 weeks will set them up for success and eliminate some of the most common points of friction for new managers. But the manager role is so high-stakes and high-impact that it’s essential to continue providing development support. Even if you’ve hired well, it’s likely that your managers never had the opportunity to build core skills and knowledge needed for the role, especially when it comes to doing the role well in the unique context of your company.

**Here are some of the most important components of successful manager “beyondboarding”:**

**1. Self-serve access to resources.**

First and foremost, managers should be able to help themselves. To make that possible, create a single source of truth that contains all information they need and/or links to relevant resources. The goal is for managers to have only one place to go to get the answers they need, fast. Include: frequently asked questions, policies, tools, templates, and contact information.

**2. Systematic up-skilling in core skills.**

Aside from having access to key information, managers need proficiency in core skills. For best results, focus on a small number of competencies broken down into easy-to-digest experiences.

At LifeLabs Learning, we’ve found that live learning works best for engagement, real-time feedback, and social learning. For even more learning stickiness, we follow live learning with digital nudges to help managers reflect, apply, and deepen what they’ve learned. Each live session should be no longer than 2 hours, and sessions should be spaced 1-2 weeks apart to leverage the power of spaced learning for improved retention.

The **Manager CORE programs** we've designed at LifeLabs Learning are based on our research of 20,000+ managers and experience teaching over 150,000 managers at 2,000 companies around the world.

*We're proud to share that 1, 3, 6, and 12 months post-training with LifeLabs Learning, over 99% of managers say they are still using the tools they learned and 90% say it has helped them become better managers.*

### 3. Deliberate practice and reflection.

Many companies spend a great deal of time teaching new skills but very little time transforming those skills into habits. We think of it as “over-teaching and under-practicing.”

To cement your managers' learnings:

- Pare down what you teach to the essential skills only (we call them the core skills).
- Space out your learning experiences so there is time in between to apply them.
- Pre-schedule nudges for managers to apply essential skills to important actions to take (e.g., career growth conversations, strategic planning, collaboration retros).
- Create time for deliberate practice and reflection. At LifeLabs Learning, we design these kinds of learning accelerants into our programs in the following ways:
  - Build practice time into every live workshop.
  - Send participants digital practice prompts (e.g., videos, quizzes) post-training.
  - Space workshops to align with learning curve research.
  - Begin new workshops with a review and reflection of past sessions.
  - Build 'practice intensive' sessions into our programs.
  - Offer ongoing Practice Labs and live Manager Office Hours

### 4. Social learning.

Our brains are wired to learn together and from each other. Be sure to create opportunities for learning to happen across managers at your company. For example:

- Create opportunities for peer-to-peer learning within live workshops.
- Schedule learning programs in cohorts so that participants get to know and rely on the group.
- Launch a manager Slack group with occasional tips and discussion prompts.
- Create an informal manager mentorship program, giving managers who are new to your company or to the role opportunities to shadow and interview senior managers.
- Hold monthly manager meetups to share wins, tools, challenges, and advice.

### 5. Just-in-time support.

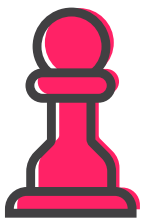
For better or worse, no matter how well we teach managers, there will be moments when they draw a blank, face a moment of crisis, or encounter a situation they don't know how to solve. For these moments, make it clear who their support team is. Include their manager and 1-2 other sources of support (e.g., peer coach, People Ops Partner, manager's manager, external coach).

If something happens in the world or at your company that creates a sudden new challenge for managers, schedule a live huddle session to offer information and resources and answer questions.

## 6. Timely feedback.

Last but not least, real learning cannot happen without feedback. The more continuous and timely the feedback, the faster the learning. For best results:

- Weave real-time feedback into your learning experiences.
- Use digital quizzes and self-assessments to build self-awareness.
- Create systematic prompts for gathering feedback from others (more on this topic in the assessment section below!).



### MANAGER UPSKILLING NEXT STEPS

- Review your existing 'beyondboarding' program to determine what you already have in place and what's missing based on the principles above.
- Identify where you might be overwhelming your managers with too much information.
- When in doubt, ask your existing managers for feedback.
- Create and schedule your milestones to systematically improve your managers' learning experience, extending the journey beyond their first year.
- Manager upskilling is where LifeLabs Learning shines. [Contact us](#) to learn more about our programs to accelerate your managers' growth.

## 3. Manager Assessment

Manager assessment is important for two key reasons:

5. Assessment is necessary for learning. Learning is nearly impossible in the absence of feedback. Imagine learning to play the piano without knowing if you're playing the right notes. Or – more inline with the reality of most workplaces – imagine waiting an entire year to find out if you played something correctly! Managers who don't know the impact of their work simply can't keep improving.
6. Assessment ensures your managers are achieving the purpose of their role. With no effective form of evaluation, companies can't tell if some of their managers are ineffective or, worse, counterproductive. Imagine a hospital that can't tell its effective doctors apart from doctors who make dangerous mistakes too often. This is the situation with managers at far too many organizations. It isn't good for companies, employees, or the managers themselves.

But measuring management can seem so complex that most organizations don't do it well or don't do it at all. Below, we share some of the simplest and most effective approaches to manager assessment:

### A. Weekly 1-1 feedback

The most elegant and agile form of assessment for managers is live, 1-1 feedback from their team, manager, and other important collaborators. Here are some easy ways to turn feedback into a ritual for your managers:

- 1-1 template: Create a recommended 1-1 agenda template including a prompt to exchange feedback or share it as an expectation for people to include a feedback reminder to any template they use.
- Feedback Friday: Designate a day of the week (like Friday!) to all pause briefly and consider what feedback you'd like to share. Create a calendar invite, reminder email, or a prompt using a feedback platform like Pavestep or Lattice.
- Ritualize retros: Schedule or set an expectation for recurring retrospectives within and across teams either on a monthly basis and/or after projects wrap up. Key retro questions include:
  - What has been effective about how we've been working together?
  - What has not been effective or has caused friction?
  - What's something we'd like to try doing differently in the future?
- Manager standards: Set an expectation with managers that asking for feedback on a weekly basis is a key responsibility of their role.
- Manager skill building: Teach managers how to give feedback and how to ask for it well. Managers who take our Feedback Skills workshop at LifeLabs Learning consistently tell us they need help getting feedback from others.

## B. Monthly metrics check-ins

While continuous feedback conversations provide the most useful catalyst for development and calibration, 1-1 feedback alone usually isn't enough to spot manager problems early. An additional system we recommend is a monthly metrics check-in. Here's how it works:

- Set metrics: Determine 2-4 key success indicators that tell you whether managers are achieving the purpose of their roles. For example:
  - 90% of team members are meeting the success metrics for their roles or on a performance improvement plan
  - A score of 4 out of 5 from direct reports on the question "my manager helps me succeed in my role."
- Review results: Set an expectation for managers and their direct reports to meet once a month to briefly review and record their success metrics together during one of their 1-1s, including a quick manager assessment.
- Direct reports can share their assessment of their manager directly (for managers to report to their manager) or submit it in a monthly pulse survey.
- Address results: Managers and their direct reports should know what results are required to qualify as meeting the expectations of the role. The fewer mysteries and surprises here the better!
  - If their metrics are on track, celebrate success and build on strengths.
  - If metrics are off track, use it as a trigger to diagnose the problem and agree on solutions to try.
  - This is also an important time to align on how much time employees have to meet the expectations of their role before being asked to leave or change roles.
  - For best results, don't let managers determine alone whether their direct report is meeting expectations. If the individual and their manager disagree, involve an additional evaluator and People Ops Partner.

## C. Skip-level check-ins

On a monthly, quarterly, or biannual basis (depending on what is most realistic and useful for your company), ask managers of managers to do check-ins with their direct reports' team. One-on-one conversations will provide the most context and nuance, but short surveys can also be a helpful tool.

**Here is a sample message managers can send to their team:**

*“Hi team! One of the ways we keep learning together as a company is through skip-level conversations. This is a 1-1/survey led by my manager [Name]. It’s a chance for you to connect in general, ask questions, and talk about what you think I’m doing well and can do better as a manager. I realize it might feel weird to share second-hand feedback, but I promise that I appreciate it and want to learn. You can even ask to keep the feedback anonymous if you’re not ready to share it with me directly (though I hope you can also tell me). After these skip-level check-ins, my manager will share patterns and recommendations for me, and I’ll pass along the key points to all of you. Thank you for participating and helping me keep getting better.”*

**And here is a sample message managers of managers can use:**

*“Hi everyone! I’m eager to support your manager and team by learning what’s working well and what can be even better. Please share your honest responses to the following questions:*

1. What does your manager do well to help you and your team succeed?
2. What can your manager do better or differently?
3. What can I or the department or company do to help you and your team succeed?
4. Is there anything else you’d like to share with me or ask me?

*Identified feedback is most helpful for learning, but please let me know if you’d like any of your answers to be anonymous. Thank you for your feedback and helping us all keep learning and growing.”*

**D. Monthly or quarterly self-assessment:**

Invite your managers to play an active role in their own assessment. Along with your monthly metrics check-ins or as a separate quarterly prompt, invite your managers to pause and reflect on their own effectiveness.

**Here are sample questions you can use, with a scale of 1-10:**

1. I am clear with my team about what is expected of them and how we define success
2. I make sure that my team has access to the resources and information they need
3. I ask my team members questions before offering solutions
4. I give them helpful feedback on a regular basis
5. I ask them for feedback on a regular basis and receive it well
6. I help my team members identify and stick to their priorities
7. I help them improve their productivity (in ways that don’t result in burnout)
8. I delegate sufficiently and effectively
9. I do my part to make sure I have consistent 1-1s with my team members
10. I give them choice and ownership over their work
11. I help them find ways to learn and grow
12. I help them see how their work matters
13. I help my team think and plan strategically
14. I help our team lead productive and inclusive meetings



15. I help my team feel prepared for changes happening at work
16. I proactively increase inclusion and mitigate the impact of bias on our team
17. I have a plan in place to make sure we have the skills we need now and in the future
18. The skills in which I feel most effective as a manager are:
19. The area(s) in which I've made the most progress over the past 3-6 months are:
20. The skill or behavior I most want to prioritize as an area for improvement for myself is:

Simply email your managers these questions to complete on their own with a recommended discussion with their manager. Or use a survey tool to gather trends. Be sure to send managers their answers.

### E. Manager surveys

To capture quantitative patterns in manager effectiveness and identify skill gaps across the organization use quarterly, biannual, or annual surveys, including 360 degree input from the manager's reports, manager, and key collaborators.

#### Here is a list of questions for direct reports:

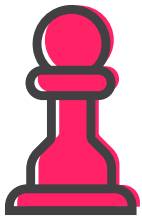
1. My manager helps me understand what is expected of me in my role and how we define success
2. My manager makes sure I have the information and resources I need
3. My manager asks me helpful questions before offering solutions
4. My manager gives me positive feedback on a regular basis
5. My manager gives me helpful and timely corrective feedback
6. My manager asks for feedback on a regular basis and receives it well
7. My manager helps me identify and stick to my priorities
8. My manager delegates effectively
9. My manager does their part to ensure we have consistent 1-1s
10. Our 1-1s are a good use of my time
11. My manager seems to care about me as a person
12. My manager helps me find ways to learn and grow
13. My manager demonstrates an interest in my career growth
14. My manager shows that my opinions and ideas matter
15. My manager gives me a feeling of ownership and choice over my work
16. My manager helps me think and plan strategically
17. My manager helps us have productive and inclusive meetings
18. My manager helps us navigate change and uncertainty well
19. My manager increases inclusion and mitigates the impact of bias on our team
20. I would recommend my manager to others



**And here is a list of questions for the manager's manager and frequent collaborators:**

1. They make it easy to collaborate with them
2. They demonstrate expertise in their role
3. They are consistent and reliable
4. They ask me for feedback and receive it well
5. They give me clear and helpful feedback

Share the results with individual managers and across the organization. For best results: highlight how past interventions have led to improvements and any plans to make progress in new areas.



**MANAGER ASSESSMENT NEXT STEPS**

- First pause to confirm that managers understand how success is defined and measured for their role. To be extra sure, do a quick pulse survey. If the definition of success is blurry, your first step is to provide clarity to managers and their teams.
- Once your success metrics are clear enough to be useful, gather a small, cross-functional group to review your current assessment system (if any), the ideas in this section of the playbook, and recommend improvements to try.
- Capture the proposal in writing and ask for feedback from all employees. Incorporate the feedback and document the plan. Why use such a participative approach? No matter how good our intentions, assessment can feel unfair and threatening. The more involved employees are in building the process, the more helpful it will be for them.

**4. Develop Career Paths**

Though many people aim for management as part of their personal career plan, once they arrive in the role, they often feel stuck. How do they keep learning and growing? Where do they go from here?

In an effort to give people a feeling of progress, companies create many levels of leadership so that titles can serve as visible markers of growth. The problem is that more levels typically result in more bottlenecks and less agility, not to mention more role confusion and feelings of organizational injustice. In this section, we share alternatives to this common but problematic approach along with tips to have plenty of skilled managers ready when you need them:

**A. Grow a leadership pipeline**

These days the leadership skills that were historically reserved for official managers are valuable for everyone in the organization. Improve your entire company's capacity to achieve results while building a strong internal leadership pipeline by investing in skill-building beyond your managers. For example:

- Hold Ask Me Anything sessions for employees interested in exploring a leadership career
- Offer manager shadowing or interview opportunities for curious employees
- Provide leadership workshops to groups of employees interested in leading in the future

- Create non-manager roles that give people the chance to practice manager skills, such as: peer coach, mentor, onboarding buddy, or trainer.
- Do rolling interviews for managers internally so that pre-qualified candidates are ready for promotion when an opening arises and candidates who aren't yet ready receive helpful feedback and learning resources.

To make your leadership pipeline even richer, take extra care to recruit and support employees whose identities are least represented in leadership roles at your company and in society in general. These individuals might be hesitant to apply for leadership positions because the odds of success appear to be low.

## **B. Create a gradual ramp up**

Give new managers an opportunity to start slowly and learn in the context of a relatively low-stakes environment. Not only does this approach produce better results, it also gives managers a more gradual sense of development. For example:

- Start as a peer coach or mentor
- Shadow skilled managers
- Serve as a supporter for another manager
- Begin with 1-2 direct reports only
- Assign a leadership partner such as another manager or a People Ops Partner

Add more people onto the manager's team or increase the scope of their role only after 6 months of demonstrated success leading a small team. Make each additional person on the team or responsibility a cause for reflection and celebration.

## **C. Provide continuous skill development**

One reason managers feel stuck in their roles is their lack of clarity on the skill level of expert managers and their own level of expertise. To address this problem:

- Clarify core manager skills at your organization.
- Provide feedback and assessment.
- Nudge self-assessment and development plans
- Give managers access to live, digital, and social learning opportunities, offering more challenging topics with tenure or an expansion of role complexity and responsibility.
- Focus on skill depth vs breadth. For example, at LifeLabs Learning we recommend focusing on just 4-5 skills in a manager's first year, with these skills serving as a prerequisite for future courses.
- Create opportunities for formal or informal mentorship so newer managers can learn from more skilled leaders.
- Give managers tangible markers of progress such as course completion certificates, digital skill badges, or opportunities to teach or coach others.
- Create rituals to pause and track progress, such as updating LinkedIn once a year or adding accomplishments and skills to a personal career portfolio.
- Give people the option to update their resume or LinkedIn profile with a set of different titles if they're still eager for external evidence of growth.

Whatever you do, be sure to create space between development milestones and make these milestones tangible. So often our expertise grows without us even noticing — make your managers' progress visible.

#### D. Rotate roles

An uncommon but powerful approach to career development for managers is to encourage role rotations every 2-3 years. Here are some ways to make it happen:

- Encourage managers to apply for internal job openings for leaders in other departments.
- Give managers the option to do job swaps with other managers.
- Develop a waitlist of managers who can be interim leaders for managers on temporary leave.
- Promote leadership residencies, giving managers the opportunity to co-lead another team.
- Create an internal consulting practice, letting managers observe and advise other teams.
- Partner with a nonprofit where managers can do a rotation as an interim leader.
- Offer role sharing opportunities for two people to do part-time/fractional work in the same role.

Not only does role rotation create exciting new challenges and skill-building opportunities, it can also reduce silos and improve cross-functional collaboration and innovation.

#### E. Design non-manager paths

Lastly, make sure that people leadership is not the only pathway to career growth for your employees. While everyone can become a better manager, not everyone is talented or energized by this role. In fact, a hybrid “player-coach” approach can cause underperformance in each domain given the tension it creates in priorities and expertise. Here are some options to avoid falling into the common “only one way up” trap:

- Create expert individual contributor tracks/roles that are as well-paid and respected as managers.
- Develop broad compensation bands in which a highly skilled individual can earn more than a newbie leader, even if the leader's earning potential is higher over time.
- Provide meaningful development experiences for individual contributors.
- Give individual contributors opportunities to access and contribute to important company decisions and plans.
- Use a co-leadership model with one leader responsible for supporting the team and one responsible for directing work. The two leaders can calibrate regularly to provide feedback and assess performance.
- Strip away some or all management responsibilities from team leaders and delegate them to an internal or external coach.
- Rotate leadership within the team, with managers serving a 6-12 month “term.”
- Use a team-based leadership model where small teams collaborate to set strategy, provide guidance, and assess performance.

Experiment with one new model with a small pilot test. You'll make new discoveries while challenging our damaging, ingrained assumption that career growth and management always go hand-in-hand.



#### CAREER PATH NEXT STEPS

- Begin by assessing the effectiveness of your current leadership career paths with input from managers and individual contributors.
- Identify one or two areas to improve, and create your plan!
- LifeLabs Learning is here to supercharge the skills of your managers, future managers, and individual contributors. [Contact us](#) to learn more!

## Ready to learn more?

We've trained over 400,000 managers, execs, and individual contributors at 2,000+ amazing companies — is yours next? Set your managers up for success with our lab-based, research-driven workshops. [Get in touch](#) with us to learn more.

We love our clients, and the feeling is mutual! When asked how likely they are to recommend LifeLabs Learning, clients give us an average score of 9.6 out of 10. Here's why (in their own words):

““

“As Instacart was scaling in hyper-growth mode, it was critical to invest in management and leadership training. I would strongly recommend having LifeLabs come in and do their magic for any institution looking to invest in people.”

**Bala Subramaniam,**  
Dr. of Product @ INSTACART

““

“This has been one of the best partnerships of my 18 year career – incredible, authentic, and knowledgeable. You're talking about a crew that knows what they're doing!”

**Rachell Morris,**  
Head of HR @ TED

““

“Our employees consistently highlight the practical application of the content and energy of the facilitators. All agree the sessions have been a valuable use of their time.”

**Kyle Grubman,**  
Senior Talent Manager @ LINKEDIN

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