

BetterHealth

A Planned Parenthood® Partnership

NEW MANAGER

COACHING GUIDE



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Introduction

Welcome to the Manager Training! We'll explore a key leadership topic and provide resources to support your growth as a manager. Whether you're new to the role or a seasoned leader, we hope the series will inspire new ideas or serve as a valuable refresher.

What makes a great manager?



Leadership is not an absolute or innate ability. It can be learned and it must be practiced. Many people naturally exhibit strong leadership qualities – but becoming a **great** manager is a process that takes time, patience, and dedication.

Whether you are seeking ways to develop as a manager or to support team members as they advance and establish more significant influence in their roles, several characteristics contribute to becoming an effective leader. **Let's look at the evolution of a great manager:**

Creating meaningful connections

Strengthening leadership skills comes easier with support. You gain the support you need to be a reliable and resourceful leader by building relationships with mentors, peers, and employees. The impression you make as a manager depends on how authentically and effectively you communicate your expectations, needs, and acknowledgments to the people around you. There are three distinct skills that great managers exhibit:

- **Communication** - One of the most essential traits of a great manager is **the ability to give and receive feedback** graciously and effectively. Managing a team means that you must meet with employees at critical intersections to direct workflow and process important feedback. **Clear communication facilitates individual and team growth.**

Identifying how your team responds to guidance and feedback is only half of the equation. Team members need to understand how to ask questions and relay their needs to team leaders as well. We'll go into greater detail on feedback in Chapter 5.

- **Delegation** - Humility empowers leaders to delegate tasks and offer support rather than micromanage their team. The act of delegation is the ability to **identify unique strengths in individuals and reward performance** with responsibilities employees desire. This process distributes the workload and helps employees practice skills as they advance their careers. Clearly identifying how everyone can contribute effectively **streamlines workflow and improves confidence** across your team. We'll go into greater detail on delegating tasks in Chapter 7.

- **Decisiveness** - Employees lean on team leaders to make decisions, especially when obstacles arise. Whether you're someone who snaps to a sound decision based on intuition or you prefer to review all of the facts, decisiveness builds confidence. **Demonstrating a willingness to take responsibility** for making important decisions also **sets a positive example** for your team.

1. Types of Leadership Styles

What kind of leader are you?

This month, we're exploring **Leadership Styles**, focusing on two key types and helping you discover the approach that works best for you. Understanding your natural tendencies and learning to adapt your leadership style when needed can make you a trusted and effective leader.

Two key leadership styles to know

There are many leadership styles you may have heard of—Visionary, Democratic, Hands-Off, and Servant Leadership to name a few. (If you're curious, here's a [Harvard blog article on leadership styles](#).) For now, let's focus on two key types: Transformational and Transactional.

Transformational Leadership

- Focuses on inspiring and motivating your team to work towards a shared vision.
- Encourages creativity, collaboration, and professional development.
- Often used for big-picture projects or strategic change.
- Example: A manager empowers their team to innovate by leading with vision while fostering personal and professional growth.

Transactional Leadership

- Centers on structure, tasks, and clear rewards for meeting goals.
- Effective for highly-specific objectives or tight time constraints.
- Example: A manager sets clear expectations and provides recognition for achieving milestones.



Which one is better?

It depends! The right leadership style often depends on the team's needs, the project's nature, and the company's culture. A younger team may benefit from transformational leadership whereas a more experienced, self-motivated team might respond well to a transactional style.

Great leaders adapt their style to meet the moment.

- Identify team needs: Is your team looking for more guidance, encouragement, or independence?
- Recognize cues for change: Low morale, underperformance, or even organizational changes can indicate it's time to adjust your approach.



Reflection moment

Before moving on, take a moment to consider the following:

- Which leadership style do you naturally gravitate towards, and why?
- How do you think your team would characterize your leadership style?
- Think about a leader or mentor you admire. How would you describe their approach? What worked, and what would you have changed?

Action Item: “Start, Stop, Continue” leadership goals

After reflecting on one or two of the above questions, write down:

- Start: One new leadership action you’d like to try.
- Stop: A habit that no longer aligns with your leadership goals.
- Continue: A leadership behavior you’re proud of and want to maintain.



Additional Resources

Book recommendations:

- Primal Leadership: Unleashing the Power of Emotional Intelligence by Daniel Goleman, Richard E. Boyatzis, and Annie McKee.
- The Leadership Challenge: How to Make Extraordinary things Happen in Organizations by James Kouzes and Barry Posner.

Articles:

- The Best Mentorships Help Both People Grow by David Nour (Harvard Business Review)

Video:

- Simon Sinek's "Why Good Leaders Make You Feel Safe" (TED Talk)

Paycom resources:

- Leading a Diverse Team
- FMLA for Leaders
- How to Hire

**These courses will be accessible under the Learning Tab on your Employee Self-Service (ESS) Dashboard in Paycom.*





2. Emotional Intelligence



Emotional intelligence (EQ) is the ability to recognize, understand, and interpret emotions in yourself and others. Beyond identifying emotions, EQ involves managing them effectively to build strong interpersonal relationships and make sound decisions.

There are 5 general components of EQ:

- **Self-Perception (Self-Awareness):** Understanding your emotions, strengths, and how you affect others.
- **Self-Expression:** Communicating thoughts and feelings in a healthy, productive way.
- **Empathy (Interpersonal):** Recognizing and respecting others' emotions and perspectives.
- **Decision-Making (Self-regulation):** Using emotional insights to make thoughtful, situationally appropriate decisions.
- **Stress Management (Motivation):** Staying flexible, resilient, and optimistic under pressure.

Different EQ frameworks may use varied terms, but they all center around self-awareness, social awareness, self-regulation, and relationship management.

The importance of self-awareness

Self-awareness is not only a cornerstone of emotional intelligence, but studies also show that it's a strong predictor of leadership success. By understanding your emotions and how they impact others, you can adapt your leadership style to different situations and team needs.

Action Item: 1:1 sync

Over the next two weeks, focus on self-awareness (you can complete a self-awareness worksheet from this [Positive Psychology article](#)) and scheduling 1:1 discussions with your team to align on work and communication styles.

What will you talk about?

This is not your average 1:1. It's an open conversation to align on work styles, communication habits, and how they prefer to receive feedback and praise. It's an opportunity to share your own leadership style and uncover preferences to reduce future miscommunication. Even with long-standing team members, revisiting these topics can reveal valuable insights.

- **Set the tone:** Let the team member know the purpose of the conversation, and your goal to better align and support them.
- **Be open:** Ask for feedback on your own leadership style too!

Reflect on your 1:1s and update your goals

After completing your 1:1 discussions, revisit your Start, Stop, Continue goals from the previous Leadership Styles email. Ask yourself:

- Do you need to adjust your goals based on what you learned?
- Were there things that surprised you? Challenged you?





Additional Resources

Diagram:

- [Daniel Goleman's emotional intelligence model.](#)

Articles:

- [Emotional Intelligence Frameworks \(Positive Psychology\).](#)

Emotional Intelligence strategies/prompts examples:

- [EWF International EQ prompts](#)
- [Positive Psychology activities, exercises, and PDFs](#)



3. Active Listening



You’ve probably heard of active listening (if not, no worries!); we’re here to offer practical tips and provide context on why this is so powerful.

What is active listening?

Active listening is the art of hearing with the intent to understand, not just to respond. It involves a level of engagement, asking clarifying questions to gather more information and to show the speaker that they are heard, encouraging them to speak. Active listening is not waiting for the other person to finish speaking, so that you may speak.

What clarifying questions actually convey

Clarifying questions aren’t just fillers, but opportunities to learn more details, fact check your own assumptions, and preemptively tackle misunderstandings.

For example, using the reflect and rephrase structure that starts with “What I’m hearing is that...” and ending with “Is that right?” lets the speaker feel heard and acknowledged, and it provides an opportunity for them to correct you—while still feeling that you are engaged. It builds trust and opens a conversation further, because in many cases, the speaker will add additional thoughts.



Great, now how do I implement this?

- **Use clarifying questions:** “Can you tell me more about that?” “I’m not sure I fully understand, could you speak on that some more?”
- **Paraphrase:** “What I’m hearing is that [...]. Is that right?”
- **Provide nonverbal cues:** Nodding (to show engagement, not agreement), giving space for pauses, leaning in, head tilting, or a simple smile (alternatively, not frowning). These can be especially important over remote meetings, where we tend to actively seek nonverbal feedback more than usual.
- **Eliminate distractions,** or when something takes your attention away, explicitly acknowledge it.

Reflection moment

Think back on your most recent team meeting or 1:1 and honestly consider:

- Were you actively listening or were you focused on your own responses?
- What clarifying questions did you ask?
- What might you have missed that probably could’ve benefited from additional clarification?
- When you’re the speaker, what kind of non-verbal cues do you look for?
- What encourages you to speak up?



Action Item: Commit to using 2 or 3 active listening techniques for the next two weeks.

- Refer to the list of techniques above, or check out Positive Psychology’s [*“How to Practice Active Listening”*](#) article for ideas. You can commit to paraphrasing once, or asking two clarifying questions, or simply providing some encouraging non-verbal cues. This might feel a little unnatural for some, but the idea is to flex our communication styles to be able to support our team better.

4. The Impact of Feedback

Feedback helps us grow and when done right, provides a meaningful opportunity for open communication. In today's hybrid workplace, feedback is increasingly crucial. It lets us know what we're doing right and what our areas of improvement are. It's important to differentiate feedback from criticism.

Your role as a manager: Praise & recognition

Positive feedback is equally as important as constructive feedback—sometimes more so, because we tend to forget to offer praise. As a manager, providing positive feedback is an area you are uniquely positioned for. It's not just a boost of confidence, it also provides direction and lets a team member know they have done something well and should continue to doing things that align. Positive feedback motivates, builds confidence, and reinforces great work. This week, try committing to providing one piece of positive feedback for each team member.

SBI: A framework for effective feedback

For those of us who need a little more help with visualizing the feedback conversation, here's a simple framework called the **SBI Method**. The SBI Method helps you organize your thoughts into three components: Situation, Behavior, and Impact.

As the title would suggest, outline your feedback by:

- **Situation:** What was the event and task?
- **Behavior:** What were the specific actions and behaviors?
- **Impact:** Provide context on how the actions affected the business or colleagues.



Best practices for effective feedback:

- Feedback should focus on actions and behaviors, never personalities, which can feel like personal criticism.
- Feedback should be timely and specific, to provide direction and feel genuine.
- Always tie feedback to impact when possible, to provide more context and understanding.



Difficult conversations

For another feedback model, the COIN framework is similar to the SBI framework above, but provides some additional notes on next steps and do's and don'ts. For more challenging feedback sessions, leading with empathy (hint, refer to the previous month's topic!), avoiding trigger words, and body language are critical.



Some quick tips:

- Timing is everything. Make sure this is timely feedback, so it is fresh on everyone's mind and does not feel like the feelings have been harbored too long.
- Be an active listener. Don't forget your body language!
- Validate and acknowledge feelings. This doesn't mean you need to agree, but it helps the speaker move onto other points of the conversation once they know you understand their emotions.
- Use "I" statements instead of "you."
- Ask open-ended questions and do not lead with assumptions.
- Come prepared with examples.
- Take a break when needed. It's okay to table a conversation when emotions are high, and sometimes, that might be the most conducive thing.
- Reach out to HR! Some feedback conversations will be more difficult, and it might be a good idea to have a third-party act as mediator.

Your opening is everything

Setting the stage can make or break the conversation. Ask if it's a good time to chat about some ideas or notes, and try to start with a question, not a statement or assumption.

For example, if you start a conversation with "I'd like to address a problem," the team member could:

- Push back that there is a "problem" because they do not feel there is.
- Immediately become defensive.
- Be unwilling to speak because they feel you have made a negative assumption and they feel you will not be supportive.

Action Item: practice and record

- Feedback can feel awkward and uncomfortable to give, so if you're hesitant, try practicing the feedback first. Write down your thoughts using the SBI framework, and add specific examples—positive and constructive! Record yourself—video is recommended, but audio is fine too—having a one-sided conversation and play it back to see how you'd feel as the receiver—what is your tone saying, what is your body language conveying? It might feel uncomfortable, but the results, or the feedback you give yourself, will be invaluable.

Additional Resources

Books:

- Crucial Conversations: Tools for Talking When Stakes Are High by Kerry Patterson, Joseph Grenny, Ron McMillan, and Al Switzler.
- Radical Candor by Kim Scott

Articles:

- How to Give Feedback as a Manager (SBI) (Hone)
- Delivering Critical Feedback Effectively (Training Industry)
- More Feedback Tips: Using the COIN Model (Matt Rutherford)

Video:

- TED Series: The Secret to Giving Great Feedback (5 minutes)



5. Strategic thinking



Have you been putting your active listening skills to good use? If you picked up new tips, we hope you've seen an improvement in your conversations and feedback sessions. If they were familiar concepts, then we hope the refresher was a boost in confidence that you're already doing a great.

Strategic thinking, at the leadership level

One thing that separates a leader from a manager is their ability to think on a strategic level. Strong leaders don't just react to daily challenges, they anticipate future obstacles and opportunities, reflect and listen to feedback, and ultimately guide their teams to long-term success. Strategic thinking is not about having all the answers, it's a skill that develops with experience and continuous learning.

Tips on how to practice strategic thinking:

- Look beyond the day-to-day. "How does this decision impact my team six months from now?"
- Block out time exclusively for strategic reflection and planning.
- Delegate with personal and professional growth in mind.
- Invite feedback from the team, encourage constructive criticism, and consider opposing perspectives.
- Stay up-to-date with new trends and keep learning.

If you'd like to explore more, "Strategic Thinking at the Top" by Ellen F. Goldman delves into these topics and provides a deeper analysis.

It might sound daunting, but don't worry, you're not meant to do it alone.

Building trust and psychological safety

Part of strategic thinking as a leader is developing strategic thinking in others; to facilitate debate and planning and allow you to make informed decisions for the long-term. At the core of these high-performance teams is psychological safety—the feeling that one can speak freely, share ideas, voice concerns, make mistakes, and be accepted without fear of embarrassment or rejection.

Tips to foster psychological safety:

- **Aim for progress, not perfect.** Celebrate wins, learn from mistakes, and don't look for blame.
- **Recruit and encourage different thinking and leverage diverse backgrounds.**
- **Be aware of and respect different communication styles**, adjusting to one another when possible.
- **Be vulnerable.** Don't be afraid to say you don't know something; it often shows honesty, not weakness. (Providing context will help!)
- **Encourage and support honest dialogue.**
- **Remember active listening and empathy!**

Think back on a time in your career that you didn't feel comfortable sharing a new idea or voicing an opposing thought. (If you haven't had this experience, use an experience from a friend or colleague.)

- Why did you not want to share your thoughts? Did you feel like you couldn't, was it the space, the communication method, the group dynamics, or perhaps you felt that no one would have listened?
- If you were managing that younger self, how would you have made them feel encouraged to speak up?



Action Items (pick one)

Book: The Five Dysfunctions of a Team by Patrick Lencioni.

Articles:

- "Team dynamics: Five keys to building effective teams" (Think With Google)
- "What is psychological safety at work? Here's how to start creating it" (American Psychological Association)

Videos:

- "Google's Project Aristotle | Building High Performance Teams"
- "Strategic planning vs. strategic thinking" (HBP Corporate Learning) (2 minutes)

Paycom resources/courses (Available under the learning tab in your ESS)

- Workplace ethics.



6. Setting Clear Goals & Delegating to Empower

Clear objectives mean clear expectations, which means clear direction. Have you ever been frustrated with a vague task and had to keep revising your work due to unclear expectations? Setting clear goals respects time, increases efficiency, and results in higher goal achievement and motivation. Even more, research shows that collaborative goal setting results in higher engagement, more challenging goals, and greater rates of achievement.

How to set team goals that motivate:

- Involve the team in goal-setting.
- Keep goals specific and challenging, but attainable.

There are many frameworks around setting goals, the most well known of them being the **SMART framework**. To implement it, make sure goals are **Specific, Measurable, Achievable, Relevant, and Time-Bound**.

Delegating to empower

Delegation isn't offloading work or simply about efficiency, it's about trusting your team, empowering them to take ownership, and facilitating their personal and professional growth. (Of course, there are still times when you just need someone to run that report now!)



Tips to delegate effectively:

- Decide what to delegate. What are stretch assignments that have flexibility, and what are assignments that you can leverage your team's expertise for?
- Match tasks to strengths and growth opportunities.
- Clarify the expectations and outcome.
- Set your team up for success. Check that they have the access and support they need. Ask what they need from you.
- Check-in and follow up.
- Allow room for errors, setbacks, and learning opportunities.
- Celebrate and acknowledge wins.

7. Employee engagement and learning styles



How is your team doing? Have you been using your EQ skills to build a culture of psychological safety and accountability? Remember that it requires time, and these skills are like muscles that need to be actively used until it becomes second nature. If you've had successes in your experience, please share them with us!

What exactly is employee engagement?

Employee engagement isn't just job satisfaction and how often people engage (we've all "liked" a photo or sent a thumbs up emoji without actually being invested)—it's about how committed, connected, and motivated people are to their work and organization.

According to [Gallup's recent meta-analysis](#), highly engaged teams display up to 78% less absenteeism, up to 51% less turnover, and a 23% increase in profitability.

What are the factors?

Unsurprisingly, employees want to feel purpose in their work, experience career growth, and feel valued. Research has also shown that strong social bonds (friends) at work increase the sense of belonging, accountability (to one another), and engagement.

Your role as a manager

In addition to the factors listed above, the manager may be the most crucial factor in an employee's sense of engagement, highlighting the impact you make. Gallup estimates that **70% of engagement is influenced by managers**, due to their unique positions between the employee and organization's goals. Here are some ways you can make a difference:



Accountability and follow-ups

We've emphasized the importance of clear expectations and collaborative goal setting. We've also introduced RACI and other frameworks as tools to keep teams aligned. Here are some final reminders on reinforcing a culture of accountability:

- **Use structured, low-pressure check-ins.** If you're worried about coming across as micromanaging, set the context upfront. Try: "Have any challenges come up? How can I help?"
- **Define accountability.** Accountability isn't just doing what you say, when you say you're going to do it. It's about proactive updates (good or bad), owning outcomes, and learning from setbacks. If things don't go as planned, shift the focus from blame to "How can we adjust and improve next time?"

Action Item:

Try using the RACI framework or one of these alternatives to keep your team aligned on a couple projects.

Additional Resources

Book:

- Leaders Eat Last by Simon Sinek.

Articles:

- "How to Delegate Effectively: 9 Tips for Managers" (HBR)



- Set clear expectations and provide autonomy.
- Make recognition meaningful and frequent.
- Build trust with transparent and consistent communication.
- Connect their work to the larger business purpose to show impact.

Recognizing different learners to engage effectively

Growth opportunities and professional development are key factors of employee engagement, but people learn and process information in different ways. Managers who recognize these differences can tailor communication, development opportunities, and incentives to improve engagement.

Common learning styles in the workplace

- **Visual:** Learn by seeing—charts, graphs, examples, and visual demonstrations.
- **Auditory:** Learn by listening to instructions, explanations, or engaging in discussions.
- **Verbal or Reading/Writing:** Learn by reading or actively writing notes. Prefer text-based resources.
- **Kinesthetic:** Learn by engaging in hands-on activities. The “I learn best by doing” style.

Remember that these are preferred and natural learning styles, but it doesn’t mean someone who is an auditory learner can *only* learn by listening.

What does this mean for you?

As a manager, be mindful of these different styles. While it may be difficult to always flex your own style, what you can do is give your team space to process information, provide ample opportunity for questions, and check assumptions.

For example, a kinesthetic learner may not have any questions immediately, which may be misinterpreted as a lack of engagement, but they often have more questions when they practice their new skills. An auditory learner may appear unengaged due to their lack of notetaking but has in actuality retained the information.





Reflection moment

Think back to a time when a colleague appeared disengaged during training or coaching:

- Did they retain the information?
- If so, what led you to believe they were not engaged?
- If they did not, was there another way the information could have been delivered for better retention?
- If they were truly not engaged, are there employee engagement factors that could have influenced this?

Action Item:

- During your team meeting, ask your team what their learning styles are, or in what environment they learn best. Don't forget to share your own style! This transparency can help reduce miscommunication and manage assumptions in the future.

Additional Resources

Books:

- [Engagement Magic by Tracy Maylett](#)

Articles:

- ["What is employee engagement and how do you improve it?" \(Gallup\)](#)
- ["Do you understand the 4 learning styles in the workplace?" \(Insperity\)](#)

Paycom resources/courses (Available under the learning tab in your ESS):

- [Introduction to Neurodiversity](#)

8. Motivation, recognition, and rewards



The importance of recognition

Recognition's not just a feel-good initiative; it's a business strategy as organizations realize that employees work for more than a paycheck. Yet, most companies get it wrong. Employees say they don't receive enough recognition, and when they do, it often feels generic, inconsistent, or disconnected from what really matters.

In a Gallup study, **employee recognition was found to have a correlation with business outcomes**. Here are some takeaways:

- **Recognition increases productivity** because people enjoy their work, their colleagues, and feel the positive impact of their work.
- **Employees continue to repeat high-performing behaviors** that have been recognized, because they know it's appreciated and feel fulfilled.
- **Employees are more likely to go beyond just doing the bare minimum**, leading to more teamwork and innovation.
- **People like coming to work where they feel appreciated** and have a sense of belonging! This greatly reduces absenteeism and turnover.

What actually matters: Extrinsic vs. intrinsic motivators

There are two types of motivators, extrinsic and intrinsic factors, and there's a right way to appeal to both. Extrinsic motivators are external rewards like bonuses, promotions, and public recognition. Employees who are extrinsically motivated:

- Respond well to tangible things like raises, awards, and perks.
- Are more engaged when they are acknowledged and praised.



Intrinsic motivators are internal factors like a sense of completion, growth, enjoyment, curiosity, and purpose. Employees who are intrinsically motivated:

- Are more motivated when they find meaning in their work.
- Look for opportunities for personal or professional growth.
- Take pride in the recognition of their contributions.

It's important to use a combination of the rewards in tandem, strategically. External motivators should complement intrinsic factors, not replace.

For example, leading with monetary incentives for a project diminishes the feeling of autonomy and fulfillment that employees gain—it becomes an obligation and personal growth is ignored. On the other hand, rewarding employees with a bonus after a successful project serves to enhance their feeling of accomplishment.

Recognize and reward for the right behaviors

Even when companies understand motivation, they often recognize or reward the wrong things, leading to frustration and disengagement. Employees feel conflicted when their efforts don't align with the rewards (or vice versa), and leadership is frustrated when there is no change in the desired behavior.

Common examples

- Teamwork is stated as the value, but rewards are only for individual sales performance.
- Leadership encourages innovation, but promotions go to employees who avoid risk, play it safe, and maintain the status quo.
- Managers say they want work-life balance, but praise employees who work late or off hours.

When employees see this disconnect between what's said and what's rewarded, they adjust their behavior based on the actual incentives.

How to fix it

- **Tie recognition to the right behaviors.** If teamwork matters, reward employees who actively support their peers.
- **Ensure rewards reinforce long-term engagement, not just short-term results.**
- **Be intentional about how and when recognition happens.** Recognition should be strategic, not random.

Action Item:

- Do you know what motivates each member of your team? If not, take a moment in your next 1:1 and ask them what part of their job they like the most. What are their short term and long-term goals? What rewards do they find motivating?





Additional Resources

Books:

- [Drive: The Surprising Truth About What Motivates Us by Daniel Pink](#)

Articles:

- [Research: "On what motivates us: A detailed review of intrinsic v. extrinsic motivation" by Morris et al.](#)
- [How Recognition Affects Employee Motivation by Thriver](#)

Video:

- ["Unlocking success: The power of rewarding initiative over outcomes" \(Simon Sinek\)](#) (2.5 minutes)



9. Conflict styles and meditation

Conflict is neutral

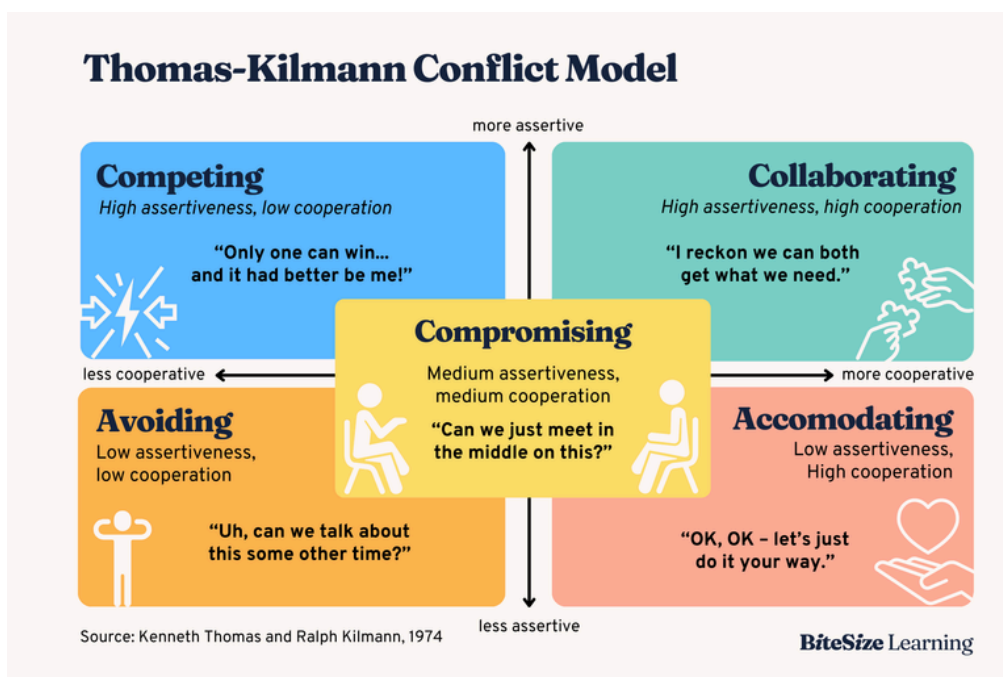
Conflict can be good or bad. At its core, conflict is a natural occurrence and merely a difference of opinions. When left unresolved, conflict has the potential to be very harmful to a team or organization. When handled well, it can spark stronger working relationships and foster psychological safety. It is a catalyst for change.

Conflict management modes: Not one size fits all

Just like leadership styles, there is no “right” conflict resolution approach. The Thomas-Kilmann Conflict Mode Instrument (TKI) identifies five common conflict-handling modes, based on levels of assertiveness (pushing your own needs) and cooperativeness (prioritizing others’ needs). **Quoting Kilmann Diagnostics, the styles are:**

Quoting Kilmann Diagnostics, the styles are:

- **Competing:** Assertive and uncooperative; pursues their own concerns at the expense of others.
- **Accommodating:** Unassertive and cooperative. The opposite of competing, neglecting their own concerns to satisfy others.
- **Avoiding:** Unassertive and uncooperative. The person pursues neither their own nor others’ concerns.
- **Collaborating:** Assertive and cooperative. The opposite of avoiding, attempting to work with others to find a solution that *fully* satisfies *all*.
- **Compromising:** Moderate in assertiveness and cooperativeness. Tries to find a mutually acceptable solution that partially satisfies all parties.





The instrument is a tool for self-awareness so you can adapt to different styles. Many of us may gravitate towards one mode but can and should flex styles depending on the situation. For example:

- **Avoiding** may be appropriate when the issue is minor, and emotions are high. (Avoiding right now does not mean avoiding indefinitely.)
- **Competing** may be necessary when decisions need to be made in high-stakes situations.
- **Collaborating** is ideal when both sides need to feel heard to commit to a shared solution.

Mediation: Finding the “why,” not just the “what”

Mediation questions

It is often suggested that there are four to five underlying layers before the true root cause is found. To help understand underlying needs, [here are some questions to try](#).

Setting up mediation sessions

For larger mediation sessions, this [11-minute video by Bob Bordone](#) is a fantastic guideline and walks through the following steps below, in greater detail:

1. Assess the situation from both sides, separately. Careful to remain neutral.
2. Establish meeting ground rules, confidentiality, and expectations.
3. Ask employees to share perspectives.
4. Actively listen to reframe statements and brainstorm solutions.
5. Go through the original concerns and ask if the agreement is satisfactory.
6. (Optional) Write out the agreement.
7. Follow up with all parties.

Best practices

- Be honest with yourself and your ability to remain neutral.
- Be sure not to take sides and refrain from sharing personal opinions.
- Encourage participants to focus on actions, not personality and intent.
- Select a neutral location for the conversation.
- Consult with HR!



10. Managing Difficult Employees



Addressing difficult employee behaviors

Unpleasant conversations are difficult to start and easy to put off. However, letting issues go unaddressed can damage team morale and result in unproductive dynamics. Effectively addressing difficult employee behaviors can result in better decisions and even advocates. **Like with mediation, focus on the employee behavior and try to get to the root cause.**

What resistance looks like

There are many articles that focus on the types of difficult employees, their personas, and why and how to manage them. We've linked several in the [Additional Resources section](#) at the end that have practical recommendations. But first, let's identify the actions and types of resistance.

There are several different types of resistance. **Here are some of the most common to spot:**

- **Active resistance:** Vocal opposition, pushback, disagreement, and criticism.
- **Passive resistance:** Delay, avoidance, disengagement, and withdrawal.
- **Constructive resistance:** Informed resistance based on understanding and knowledge.
- **Compliance (surface agreement):** Non-committal agreement. Saying yes to appear aligned but not following through. Doing the bare minimum to avoid conflict.

Some of these behaviors may not appear as resistance, so watch for behavioral patterns. Resistance is often rooted in confusion, fear of change, feeling unheard, and burnout.

How you can manage resistance:

Unpleasant conversations are difficult to start and easy to put off. However, letting issues go unaddressed can damage team morale and result in unproductive dynamics. Effectively addressing difficult employee behaviors can result in better decisions and even advocates. **Like with mediation, focus on the employee behavior and try to get to the root cause.**

- **Active resistance:** In a 1:1 or small group setting, acknowledge the behavior directly and respectfully. Ask questions like “Can you walk me through your perspective?” Clarify goals on both sides.
- **Passive resistance:** In a 1:1, point out the behavior as an observation, communicate the impact, and ask “why” or “what’s on your mind?” for better understanding.
- **Constructive resistance:** Engage and collaborate. Allow room for the employee to speak freely, brainstorm ideas, and voice concerns.
- **Compliance (surface agreement):** Much like passive resistance, point out the behavior you’ve observed and ask if there are any concerns or blockers for the employee. Arguably one of the most difficult resistances to address, because it is easy to appear as if there is no conflict.

Some of these behaviors may not appear as resistance, so watch for behavioral patterns. Resistance is often rooted in confusion, fear of change, feeling unheard, and burnout.

Preparing for difficult conversations

Start by reframing

Before starting, mentally reset and approach the employee with a different perspective. Labels play a crucial role and subconsciously affect our words and actions. Instead of labeling the employee as a difficult employee, focus on difficult behaviors. Instead of thinking “addressing a difficult employee,” try “understanding blockers and challenges.”

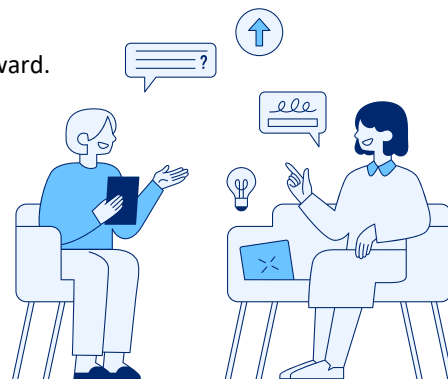
Conversation frameworks

As a reminder, we shared the SBI (Situation, Behavior, Impact) method, along with some tips and tools for active listening in our second month of the series: Effective Communication & Feedback (we highly recommend looking back and revisiting it!).

The Pendleton Method is also a great framework for feedback. It is comprised of five steps (not always in this order):

1. Ask for their input first.
2. Share feedback around strengths.
3. Ask what they could improve or do differently moving forward.
4. Share feedback around what they could do differently moving forward.
5. Together, agree on an action plan.

For a more in-depth guide, you can [read more here](#).





Resistance into engagement

Difficult moments are opportunities for realignment! People often resist when they don't feel seen or supported. This is a good opportunity to ask:

- What's working well for you? What's not?
- What barriers are getting in your way and what can I do to remove them?
- What kind of support would be helpful from me?
- I'd love your opinion on [project/assignment]. What do you think about...?

Action Item:

- Next time you need to give a team member some difficult feedback, write out one of the frameworks we shared and outline the conversation. For many, mapping out and visualizing a difficult conversation makes it feel much more manageable and reduces stress.

Additional Resources

Books:

- Crucial Accountability by Patterson et al.

Articles:

- "Resistance to change: 7 types and how to deal with them" by Vanessa Van Edwards (Science of People)
- "Dealing with difficult employees: Taming disruption in the workplace" by Miljana Kankaras (Leadership Trust)
- "The 5 most difficult employees (and how to handle them)" by Claire Lew (Canopy)

Video:

- "Thanks for the feedback by Douglas Stone and Sheila Heen – A visual summary" (Verbal to Visual) (11minutes)

11. Communication, Inclusion, and Connection

We're turning our attention to managing and leading teams—when you don't share the same space. With the shift to remote work, the way we connect, interact, and build trust has to be intentional and meaningful.

Communicating clearly from afar

Without tone and body language, even small communication gaps can widen quickly. Messages get misread, and assumptions go unchecked. Leading remotely means getting ahead of those gaps.

Here are a few key considerations:

- **Synchronous vs. Asynchronous communication.** Not everything needs a meeting, and not everything can be solved over text. Use **synchronous tools** (like video calls) when urgency, sensitivity, or brainstorming is involved. **Go async** (email, shared docs) when there's time to process or review.
- **Overcommunication vs. clarity:** Remote work often requires more communication, but that doesn't mean saying the same thing five times. Reinforce messages across multiple channels and share the why, not just the what.
- **Create consistent, dependable patterns.** Team routines like weekly roundups and check-in days build structure, connection, and help team members mentally plan for the week.

Fostering inclusion and belonging remotely

Part of the challenge of engaging remote teams is the lack of casual, natural interactions. Watercooler talk and simple compliments build connection, and in remote teams, these moments need to be intentionally created.



Tips to embed inclusion:

- **Be conscious of proximity bias.** It's easy to give more visibility or recognition to those you interact with most. Be intentional about sharing opportunities, feedback, and praise equitably—regardless of location or reactions on Teams. [Read more about proximity bias](#) and how to lead equitably.
- **Create team rituals that work anywhere.** For both remote teams, practices like “win of the week,” rotating icebreakers, or opt-in virtual social hours give everyone a chance to connect, no matter where they're based.
- **Celebrate asynchronously.** Use text channels, shared docs, or voice/video messages to celebrate wins or appreciation. These low-lift options work well for time zones, energy levels, and introversion—and they build recognition into your team culture. (Bonus tip: Ask every team member how they prefer to be highlighted.)



Inviting input for different communication preferences

Some people prefer speaking in a group. Others need time to think or feel more comfortable sharing via chat or 1:1.

Some ways to encourage input:

- Pause deliberately in meetings. Give people space to speak.
- Offer alternatives. Use shared docs, chat threads, or 1:1s for quieter methods.
- Instead of “Any questions?”, try: “Was anything unclear?” or “How might we do this differently next time?”

Overcommunicating the right way

Lack of interactions can mean space for confusion and misinterpretation. When done right, overcommunication can be a valuable tool in the remote workforce, increasing clarity and understanding.

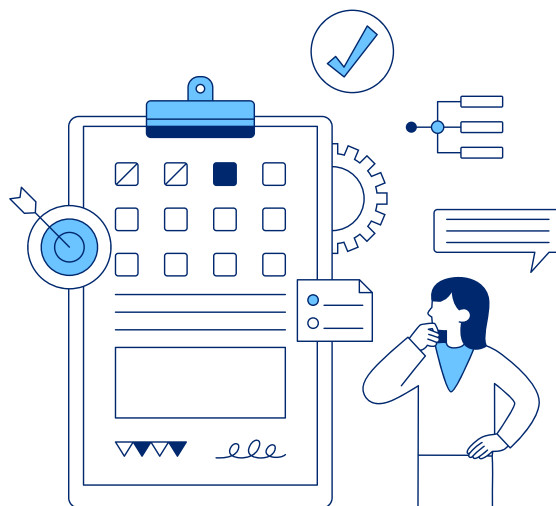
How to overcommunicate effectively:

- **Repeat with purpose.** Share key updates in different formats—Teams post, meeting mention, follow-up email.
- **Say the why, not just the what.** Narrate the invisible. Context is often lost in remote settings and silence invites assumptions. Sharing rationale also builds trust.
- **Close the loop.** Just because you said something doesn’t mean it was heard. Follow up with, “What questions do you have?” in different settings.

Reflection moment

Consider the communication between you and your team:

- When you share decisions, are you explaining the full context, or is there space for misinterpretation? What have you not said?
- How do you ensure your quieter team members’ opinions are heard?



Action Item:

For your next team meeting, adopt a moment of connection (and implement it weekly if it's successful!). Here are a couple ideas:

- Start with an icebreaker (and rotate through the next weeks).
- Go around and have everyone answer, "What's good?"
- Choose a theme song for the day.

Additional Resources

Books:

- [The Long Distance Leader by Kevin Eikenberry and Wayne Turmel](#)
- [Leading from Anywhere by David Burkus](#)

Articles:

- ["Synchronous vs. asynchronous communication \(with examples\)" \(Indeed\)](#)
- ["4 ways to balance under and over-communication as a remote work manager" \(Atlassian\)](#)
- ["Top 7 challenges of managing remote employees" \(Hubstaff\)](#)



12. Mental Health, Trust, and Managing from Afar



Remote work gives people flexibility—but it also comes with emotional tradeoffs: loneliness, video conferencing fatigue, and the creeping pressure to be “always on.” These challenges are real, and as a manager, you set the tone for what’s acceptable and what’s sustainable.

Ways to support mental health intentionally:

- **Normalize boundaries.** Set expectations together around working hours, response times, and time off—and model them yourself! Delay emails until working hours, use PTO visibly, take your lunch break, and protect your own focus time.
- **Bring energy and mental health into 1:1s.** Try: “How’s your energy level this week?” or “Is anything feeling heavier than usual?”
- **Fake a commute.** Encourage people to start or end the day with a walk or non-work ritual to simulate a mental transition between home and work. This act allows people to disconnect, reset, and establish boundaries.

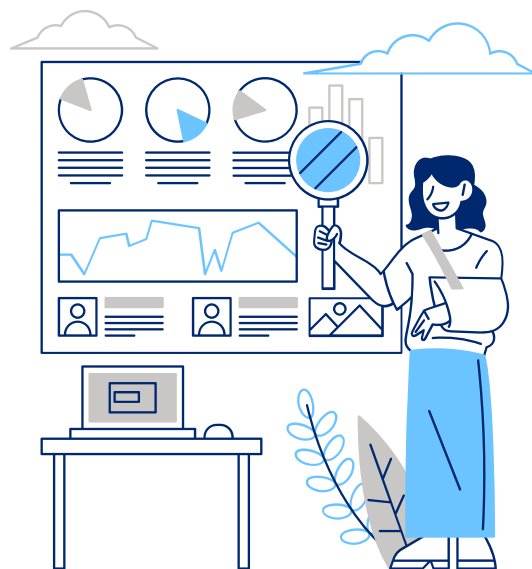
Create space for casual connection. Pair employees for optional coffee chats or set up informal team-wide virtual chats. Give employees a space to casually connect and feel it’s okay to talk about non-work-related topics.

The remote manager

As a remote manager, your role may be even more essential than before. You're a vital resource in helping your team stay aligned, energized, and supported from a distance.

The role hasn't changed—your goals are still engagement and performance—but the how has.

Traditional management behaviors like assigning goals top-down, tracking hours, or rewarding constant visibility don't land the same way remotely.



Instead, successful remote managers:

- **Lead with outcomes, not tasks.** Focus on what success looks like, not how it gets done. Give people ownership over *how* they get there.
- **Foster autonomy and trust.** Offer flexibility, but back it with support and structure.
- **Act as enablers, not enforcers.** Remove blockers, coordinate across silos, and coach instead of command.
- **Set goals together.** Invite team input. Top-down assigned goals are less impactful in remote teams.
- **Ask, don't assume.** Just like how your team can make assumptions, so can you. Don't fill in the gaps, ask instead.
- **Practice micro-understanding, not micromanagement.** Shift from managing tasks to understanding the person. Build awareness of each team member's challenges, preferences, and support needs so you can anticipate blockers and build a sense of agency. Micromanagement is restrictive, but micro-understanding is supportive.

Facilitating remote meetings that don't drain people

Meetings aren't intrinsically bad. They can leave you feeling motivated and energized when productive, but poorly designed meetings are exhausting.

Tips for better remote meetings:

- **Provide an agenda.** No agenda? Rethink if it really needs to be a meeting.
- **Start with connection.** Begin with a quick check-in or light icebreaker.
- **Cameras: yes or no?** Agree on when cameras are encouraged and when they're optional.
- **Keep them short.** Aim for 30 minutes or less. End early when you can.
- **Use inclusive tools.** Provide more ways to engage like polls, reactions, chats, etc.
- **Close with clarity.** Always summarize decisions and assign next steps



Trust in remote teams: Checking in without micromanaging

Avoid checking-up instead of checking-in. Skipping empathy without follow-through or only asking performative questions can make people feel monitored. Empathy only builds trust when it aligns with your actions; otherwise, it risks coming across as insincere. Revisit the [Active Listening segment in May](#) and [Psychological Safety segment in June](#) for some additional tips.

Try questions that go beyond deliverables:

- “What kind of support would be most useful for you this week?”
- “How are you feeling about your current workload or rhythm?”
- “What’s been a highlight of your week so far?”

Reflection & Action Item

Consider the communication between you and your team:

- Saturday mornings? (Adding “no rush!” still counts.)
- When was the last time you took real time off?
- Are you offering multiple feedback channels for different comfort levels?
- Are your check-ins built for connection, or just status updates?
- You don’t need a brand-new system, just small adjustments.

Additional Resources

Articles:

- [“The ultimate guide to managing remote and hybrid teams”](#) by Laura Pop-Badiu
- [“Leading from afar: How to effectively manage a remote team”](#) by Patrick Mensah (Forbes)
- [“Micro-understanding vs. micromanagement”](#) by Raghu Krishnamoorthy

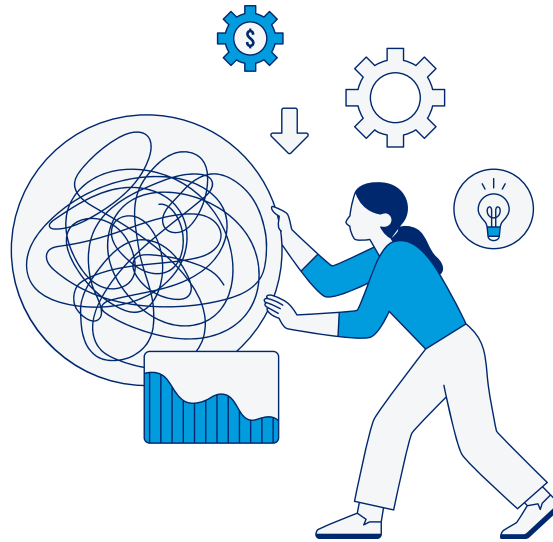
Resource:

- [GitLab’s Guide to All-Remote](#)

Paycom resources/courses (Available under the learning tab in your ESS)

- Scheduling Screen Time Breaks

13. Understanding Change & Preparing Your Team



What is Change Management and Why Does it Matter?

Change management is commonly described as a structured process and group of frameworks to “manage the people side of change.” It focuses heavily on communication and managing the psychology of change but also includes ensuring that individuals have the right resources and capabilities for change.

This can include changes that are:

- Strategic (e.g., new business priorities)
- Operational (e.g., new workflows or tools)
- Cultural (e.g., shifts in values or leadership expectations)

Its importance and impact

Change management is crucial for large changes. It helps mitigate resistance, reduces pain points for employees, and creates a much smoother process to change adoption. Change is constant, and having change management plans in place allows for quicker reactions when new developments arise. In remote environments, where context and communication are limited, guiding change requires even more intention.

Begin with a gap analysis

Change management is often reduced to preparing, enabling or equipping, and reinforcing change, but for larger organizational changes, a gap analysis—an evaluation of where you are now and your desired end state—should come first.

A gap analysis is a tool to help you clarify the “why” behind a change by asking:

- Where are we now?
- Where do we want to be?
- What’s getting in the way?

If you’re unable to answer any of the questions fully, it’s a sign that additional research or stakeholder conversations are needed. You can learn more about how to use this method [in this overview from Harvard Business](#).



Change models to know: Lewin & ADKAR

There are many change models out there. From Lewin's 3 phase model to [Burke-Litwin's 12 factors](#), these models vary on complexity and application. What's important to note is that each is a flexible framework meant to help guide your thinking. No model is definitive.



Lewin's 3-Stage Model

[This high-level framework](#) breaks change into 3 steps:

- **Unfreeze:** Prepare people to let go of old behaviors.
- **Change:** Introduce and support new behaviors.
- **Refreeze:** Reinforce and normalize the new state.

Lewin's model is a helpful metaphor: Change begins by loosening old patterns so new ones can take shape. Regardless of the size of change that occurs, this is a good, simple foundation to begin with.

Prosci ADKAR Methodology

One of the most popular models to date, [the Prosci ADKAR model for change management](#) focuses on individual change through 5 practical stages:

- **Awareness:** Being aware of and understanding the need for change.
- **Desire:** Wanting to participate and support the change.
- **Knowledge:** Knowing how to change.
- **Ability:** Having the skills to implement the change.
- **Reinforcement:** Sustaining the change.

Knowledge vs. Ability

While **Knowledge and Ability** are very similar, knowledge is about knowing how to change and ability is about being able (having the skills and resources) to change. For example, if the change is implementing a new timecard system, Knowledge would be ensuring that employees know what needs to be done (begin clocking in and submitting timecards via a new system by a kickoff date), and Ability would be to provide training on how to use the new system. This can often be combined into one stage when no additional resource or skill is needed.

ADKAR in summary

ADKAR focuses on communicating change as soon as possible and making employees aware of the change, building their desire for change to manage resistance, teaching employees how to change and provide them with the needed resources or training, and evaluating and reinforcing the change after the change has occurred. Feedback loops and early communication are core components of the ADKAR model.

A manager's role in change

If change management is the bridge, managers are the guides crossing it with their teams. During change, your team will look to you for direction and answers. You have the challenging role of being both the unofficial sponsor and messenger.

Your responsibilities include:

- **Communication:** Be the voice of clarity and consistency. Be transparent about what you know, what's still being decided, and even what you don't know (but will find out!).
 - Communicate as early as possible, so people have time to digest information and ask their questions. Don't wait until you think you have all the answers, but after you have a good understanding of why.
 - Provide consistent updates, including no updates, so employees know change isn't forgotten.
- **Creating psychological safety:** Let people express resistance or confusion without fear.
- **Staying involved:** Model adaptability and stay up to date (as best you can).
- **Monitoring resistance:** Pay attention to subtle signs—silence, disengagement, passive pushback.
- **Providing feedback to leadership:** You're not just a messenger. You're a translator and safety net. If something isn't landing, speak up.

Many formal change initiatives include a change management plan and a communication plan. You might not create these, but you will be expected to support them. Depending on your role and the change, your involvement level will differ, but you'll never go through the change alone.





Action Item: Mini gap analysis

Try a [gap analysis](#) using a simple (or complex!) change example, at work or at home:

- What's the current state?
- What's the desired future state?
- What needs to change and what might get in the way?
- What more information do you need? (Do you know the root cause?)

Additional Resources

Books:

- ADKAR: A Model for Change in Business, Government and our Community by Jeffrey M. Hiatt
- Switch: How to Change Things When Change is Hard by Chip Heath and Dan Heath
- Influencer: The New Science of Leading Change by Joseph Grenny
- The Culture Code: The Secrets of Highly Successful Groups by Daniel Coyle

Articles:

- "The change curve, explained" (BiteSize Learning)
- "9 change management models to compare" (Prosci)

14. Leading and Sustaining Change

Implementing the change

At some point, preparation becomes action. As a manager, you don't always choose the change, but you do influence how it lands. Implementation won't be perfect and adjustments are part of good change management. The key is to stay responsive and as prepared as possible. Timelines are helpful, but flexibility is critical. Change is rarely linear.

Kotter's 8-Step Model for organizational change

Previously we shared the [ADKAR model](#) for change management at an individual level. To complement, Dr. John Kotter's model outlines eight steps that help organizations navigate major change. While the full model is typically used at a strategic level, several steps are especially useful for managers on the ground:

- **Form a strategic vision** (Step 4): Be a bridge between leadership's goals and your team's day-to-day. Repeat the why often and show how the change connects to their work.
- **Enable action** (Step 5): Remove barriers and friction. Ensure people have what they need (clarity, access, authority, etc.) to move forward.
- **Generate short-term wins** (Step 6): Highlight progress, even if small. Wins build confidence and buy-in.
- **Sustain acceleration** (Step 7): Reinforce the behaviors and habits that support the change. Consistency helps the new become normal.

Explore the full 8-step model from [Kotter International here](#).

Managing resistance

Resistance is feedback. When people hesitate, it's often a sign of fear, fatigue, or feeling left out of the process. Your job isn't to eliminate resistance entirely, but to surface it early and acknowledge it.

Types of resistance you might encounter:

- **Confusion**: "I don't get what's changing."
- **Fear**: "What does this mean for me?"
- **Disagreement**: "I don't think this will work."
- **Fatigue**: "This is just another change—we've seen it before."

Don't wait for resistance to show up—anticipate it. Look for early signs like disengagement, slowed execution, or confusion. Create space for questions and concerns before they grow. Be prepared to clarify, repeat, and connect the dots multiple times.

Active vs. Passive Resistance

Not all resistance is visible. Some people may speak up or push back directly (active), while others may quietly disengage or delay (passive).

- **Active resistance** shows up through vocal objections, pushback, disagreement, or visible frustration. While uncomfortable, it can offer valuable insight.
- **Passive resistance** is harder to detect. It often looks like missed deadlines, avoidance, or slow execution. Check-in with these employees on how they're feeling and their thoughts on the change. It can often stem from confusion or fatigue.

For a refresher on how to manage resistance and how it can show up in employees, refer back to our Managing Difficult Employees segment.



A manager's role in reinforcing the change

You play a key role in reinforcing new behaviors after the change has been initiated. Some methods include:

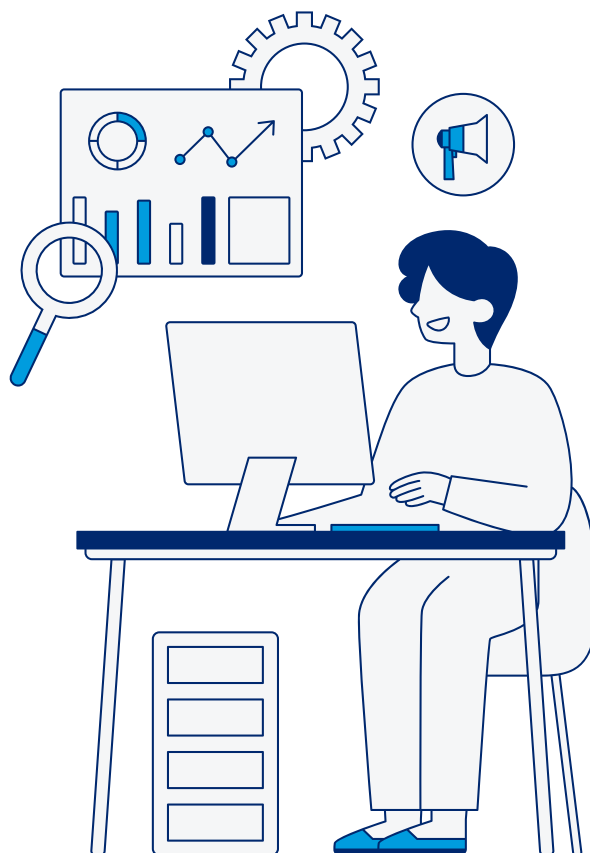
- **Model the shift.** What you say and what you do must align.
- **Recognize and reward progress.** Shout out individuals or milestones as evidence that the team is adapting. Make recognition specific in terms of action.
- **Close the loop.** If someone gives feedback or raises a concern, follow up. Even if the change can't be reversed, acknowledging their input builds trust.
- **Link actions to outcomes.** Help the team connect their efforts to the bigger picture—how the new behavior improves results, collaboration, or customer experience.

Measuring success and sustaining momentum

Change isn't done after the rollout. In order for change to be considered successful, it needs to be permanent. Change management requires measuring adoption rates and continuously reinforcing the change. This could mean sending out FAQs, holding information sessions, or additional training sessions.

Some indicators to track:

- **Adoption metrics** (e.g., % of team using the new tool or process)
- **Behavioral signs** (e.g., more collaboration, faster decision-making)
- **Feedback themes** (e.g., "It's starting to feel easier")



Action Item: Create a change communication plan

Choose a hypothetical or upcoming change and draft a simple communication approach for your team. You can use this [communications checklist for change management](#). Start with:

- What's changing and why.
- What's in it for them.
- 2–3 key messages you'll repeat.
- When and where you'll share updates (Teams, meetings, 1:1s, etc.).

Consider additional things such as whether or not you'll need a change sponsor and who the communicator should be (who do people want to hear from?).

Additional Resources

Book:

- [Leading Change](#) by John P. Kotter

Articles:

- [“Reinforcement and sustaining change management”](#) (Prosci)
- [“Why your employees really resist change”](#) (Forbes)
- [“Kotter’s 8-step change model, explained”](#) (BiteSize Learning)

Video:

- [Kotter’s 8-Step Change Model Explained](#) (YouTube) (8 Minutes)

Podcast:

- [How to Lead Organizational Change](#) (Coaching for Leaders) (39 minutes)



15. Laying the Foundation for Ongoing Performance Management

What performance management really is

Performance management is an ongoing relationship where managers and employees share accountability. It's how managers drive clarity, alignment, and results, taking responsibility for the growth of their team.

When ignored or treated as a formality, it erodes motivation, delays needed conversations, leaves employees feeling disengaged, and results in transactional-feeling check-ins.

Coaching vs. Managing

- **Managing:** Focuses on tasks. What needs to be done, when it's due, what's off track.
- **Coaching:** Focuses on the person. How they're approaching the work, what they're learning, and what support they need to grow.

Performance management requires both. If you're only managing tasks, you'll miss the chance to build capability and confidence. If you're only coaching without clarity, you risk drifting from priorities.

Great managers know when to switch hats. Use coaching to ask questions and build reflection. Use managing to establish markers and stay on track.

SMART Goals and OKRs

Vague goals lead to vague outcomes. That's where two clear goal-setting frameworks come in:

- **SMART goals** help define expectations for tactical or role-specific work. They're Specific, Measurable, Achievable, Relevant, and Time-bound.
- **OKRs (Objectives and Key Results)** are better suited for organization/department-wide priorities or team-level impact.
 - o **Objective:** What you want to achieve. It should set direction and be clear, inspiring, and qualitative.
 - o **Key Results:** How you'll measure progress or success. They're quantitative, specific, and focused on outcomes.

For more guidance and examples, check out these Asana articles on [SMART goals](#) and [OKRs](#), for practical breakdowns on how to set focused, measurable goals at every level.

Remember that the most effective goals are collaborative between the parties. Avoid setting goals in a vacuum or handing them down unilaterally.



Continuous check-ins vs. performance review-only feedback

Performance management should be a regular occurrence, not a once-a-year event. Only relying on formal review cycles leads to missed opportunities and misalignment.

As a manager, you're responsible for creating a regular cadence of performance conversations. If your check-ins start to feel rushed, you can always adjust the occurrence to what suits you both. Use check-ins to regularly address blockers, revisit goals, and foster engagement.

What do effective check-ins look like?

- They include space to check in on the person, not just the work.
- They focus on priorities and goals alignment, blockers, and updates.
- They encourage growth through coaching.



Why timely feedback matters

You've heard it before, effective feedback is timely (close to the moment or event), but why? When you wait too long, context fades, assumptions build, and the feedback becomes increasingly subjective rather than objective.

Timely feedback helps:

- Correct course while there's still time to act or reinforces good habits while they're still fresh.
- Keep things objective, while you're able to focus on fresh facts rather than fuzzy memories.
- Show that you have the employee's growth in mind and not harboring examples for a review.

Delayed feedback isn't as good as "any feedback"

Delayed feedback, even when well-intended, can be an unwelcomed surprise that triggers a "Why didn't you tell me earlier?" response. It tarnishes trust (especially if an employee starts feeling "Have you felt this way the whole time?") and is often demotivating. If you give delayed feedback, be sure to be transparent on why the feedback is delayed, taking responsibility and reinforcing psychological safety.



Reflection & Action Item

Use this checklist to assess whether your current practices are enabling performance—or simply tracking it.

- Do I hold regular 1:1s or performance check-ins?
- Am I giving timely feedback?
- Do team members understand goals, expectations, and how success is measured?
- Am I creating space for coaching conversations—not just updates?

If the answer is unclear or a “no” to any of these, prioritize it for the month. What changes can you make?

Additional Resources

Book:

- [Measure What Matters by John Doerr](#)

Articles:

- [“Reinventing performance management”](#) (HBR)
- [“What is performance management? The complete guide”](#) (AIHR)

16. Performance Reviews that Drive Growth

Preparing to write and deliver reviews

Before you begin drafting, it's worth taking a step back. Evaluate your own mindset and do a wellness check with yourself—how are you feeling? Then consider alternative explanations for actions, and check your own assumptions and biases.

Before you start:

- Are you in the right headspace to give thoughtful, balanced feedback?
- Will anything in this review come as a surprise?
- Were there blockers or missing support?
- Do a quick bias check. If you need a refresher, here's an article on additional biases.
- Block off time. We know it's not easy to balance reviews with daily tasks.
- Consider your team's individual communication and feedback styles.
- Collect specific examples of observations, behaviors, and outcomes to avoid relying on impressions.

Turning reviews into plans: Where do we go from here?

Growth doesn't mean the same thing for every person. For some, it's about increasing impact and a new title. For others, it's about deepening expertise, gaining stability, or exploring new territory.

Here are some development options when considering next steps:

- **Stretch assignments:** New responsibilities that help build new skills, without needing a title change (yet).
- **Lateral development:** Gaining breadth by cross-training, working across domains, or on new types of problems.
- **Stabilization and support:** More consistency, clarity, or tools to succeed for those who are still developing in their current role.
- **Stay the course:** Continuing the current track for those who are high-performing, engaged, and fulfilled. Just make sure this is what they want.

Using the GROW model for coaching

For employees who can benefit from coaching, the GROW model is one of the many tools that can help guide a conversation to be structured, reflective, and collaborative.

GROW consists of:

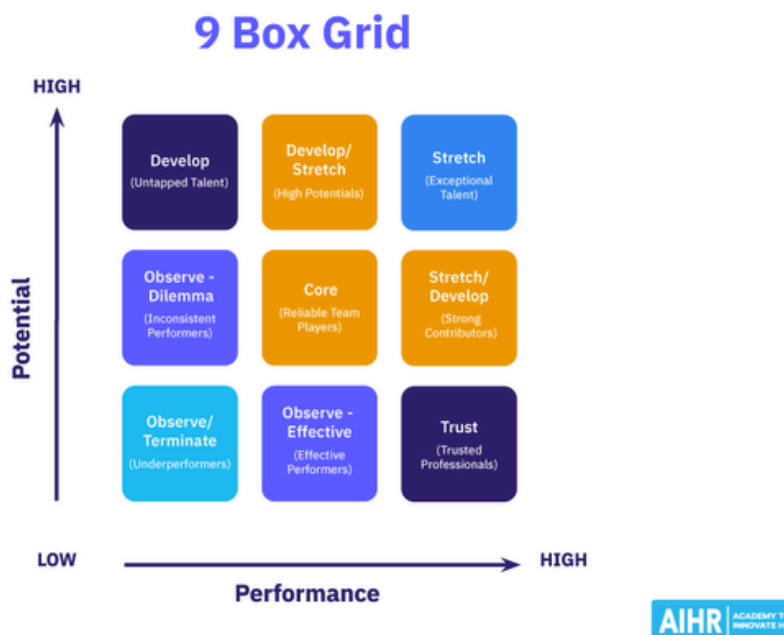
- **Goal:** What does the employee want to achieve next? This could relate to skills, performance, or development areas. They could also be SMART goals.
- **Reality:** Where are they now? What are the strengths and challenges? Talk honestly about current performance, obstacles, or role clarity.
- **Options/Obstacles:** What could they try differently to get to the desired outcome?
- **Way Forward/Will:** What specific steps will they take—and what support do they need from you?

The purpose is to ask questions and guide the conversation, not prescribe the answers. For a list of questions that you can use at each step, refer to this coaching article.



Using the 9-Box grid to assess your team

The 9-box grid is a tool to help you evaluate each team member's **current performance** and **future potential**. It's not about assigning a label (or box), it's a way to visualize where someone is now, where they could be, and how to plan intentional next steps.



A 9-Box example from AIHR

- **Performance** refers to how well they're meeting expectations and delivering results.
- **Potential** refers to their capacity to take on more scope, complexity, or leadership.

Use the grid to step back and look across your team. In addition to looking at each team member individually, it can help reveal blind spots, patterns, or gaps in support. Once you've mapped out where people generally fall, use that insight to shape next steps.

Here are some suggestions:

- **High performance and high potential?** Consider a stretch assignment or mentorship into leadership roles.
- **Solid performance with room to grow?** Focus on coaching, feedback, and clearer **goals**.
- **Struggling in their role?** Revisit expectations, blockers, and available support.

Action Item: Plot your team using the 9-Box template

Review the 9-box model and plot your team. Where does each person land today in terms of performance and potential? Then, identify a “next step” for each. That might be a stretch assignment, targeted support, or continuing the course intentionally—not everything needs to be a change!

Additional Resources

Book:

- [The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever](#) by Michael Bungay Stanier

Articles:

- [“9 Box Grid: A Practitioner’s Guide”](#) (AIHR)
- [“What is the 9-box model or 9-box grid?”](#) (HiBob)
- [“10 Coaching models & styles to use in the workplace \(2025\)”](#) (AIHR)



17. Introduction to Self-Care and Its Importance

Understanding Self-Care & Recognizing Burnout

What is self-care for a manager?

Self-care is more than just taking a day off or following a 5-minute meditation (but those do help!). It's the practice of managing your physical, emotional, and mental health. As a manager, your well-being doesn't just affect you, it often trickles down to your team. When you're feeling anxious or depleted, your team feels it.

Model behavior

Teams take their cues from managers and leaders. If you never take PTO, check email at all hours, or power through exhaustion, your team will feel pressured to as well. By being honest about boundaries and burnout, you normalize that for others as well.

Recognizing the signs of burnout

Burnout sneaks up on you. It builds gradually, slipping in with stress, overwork, lack of sleep, and abandoned PTO. Common factors of burnout include unsustainable demands and a lack of resources, support, or training, making managers especially vulnerable as they balance increased workloads and emotional labor.

Some signs to be aware of:

- Physical fatigue and sleep disruptions
- Lack of energy and motivation
- Negative mood swings and irritability
- Emotional withdrawal

Remote settings make it harder to spot these signs in others and ourselves. We miss visual cues, overestimate what people can take on, and can blur the line between support and surveillance. Read more about burnout signs, causes, and prevention techniques at [The Wellbeing Project here](#).

Managing burnout & building resilience

Rest, PTO, and recovery

Rest (or better yet, sleep) is one of the key components of health and longevity. Rest is productive—it resets emotions and minds so you can think clearer, make better decisions, and have the capacity to support others. Yet many managers hesitate to use PTO, feeling the pressure to always be “on.”

Here are [5 ways to help you take time off](#) (guilt free):

1. Understand it's about rest (and you deserve it).
2. Lead by example.
3. Clearly communicate expectations before going on PTO (so you and the team can both rest easier).
4. Set boundaries during your time away.
5. Start and end your trip with no-meeting days to allow you to prepare for your time off, and to ease back into the routine of work.

Building resilience with the Health Triangle

We often push through stress and ignore the root cause, allowing the trigger to recur without having built resilience. Resilience isn't building stamina so you can power through, it's about noticing what you need and adjusting your mindset or approach when possible.

The Health Triangle

The health triangle is a visualization tool for overall well-being. It includes three core pillars that support each other: physical, mental, and social health.

- **Physical health:** Get consistent sleep, stay active, and fuel your body with nutritious food. Use movement to reset during the workday, even if it's just a short walk.
- **Mental health:** Set boundaries around work hours, take breaks, and use techniques like deep breathing or guided meditation to manage stress.
- **Social health:** Make time for connection. This could mean scheduling a walk with a friend, joining a professional peer group, or reaching out when you need support.

When one side is neglected, the others are affected, putting you off balance and compromising your resilience to stressors. You can read more about [the Health Triangle here](#).

Action Item: Balance check

Complete a quick personal audit using the Health Triangle. Consider:

- **Physical:** Am I sleeping enough, eating well, and moving enough?
- **Mental:** Am I aware of my emotions and understand the root causes?
- **Social:** Do I have people I trust to share my thoughts with?

If you find you're lacking in one area, what is something you can do this week to supplement it?

Additional Resources

Book:

- [The Resilience Factor](#) by Karen Reivich and Andrew Shatté
- [The Gifts of Imperfection](#) by Brené Brown

Articles:

- ["Self-care is not selfish"](#) (Psychology Today)
- ["The skill of self-care: A leadership competency for the modern era"](#) (Forbes)
- ["How physical health affects mental health"](#) (Mindful Science Centre)
- ["How to recover from burnout"](#) (Guardian)

Paycom resources/courses (Available under the learning tab in your ESS)

- Addressing stress
- oWhat is wellness?



18. Self-Care & Resilience in Practice



Modeling self-care as a leadership skill

Managers and leaders set the tone. Your actions signal to teams what is expected, and your emotions are a weathervane that can trigger panic in the face of inclement conditions. Prioritizing your own well-being is not selfish, it's strategic.

A reminder of three key habits to model:

- Use your PTO visibly.
- Be honest when you need a moment to reset.
- Avoid late-night messages and turn off notifications after hours.

Supporting team wellness

Beyond individual actions, managers can shape a culture of sustainable work by structuring the team's workflow and communication habits.

Things to consider:

- Do deadlines feel realistic, or always urgent?
- Are meetings necessary, inclusive, and spaced out?
- Are communication channels being used effectively or is there oversaturation and excessive noise?

Consider introducing:

- "No Meeting" blocks or quiet hours.
- End-of-day buffer windows to close out work.
- Shared communication channel expectations so as not to overwhelm.

Wellness models, frameworks, and tools

8 Dimensions of Wellness

Originally developed by SAMHSA, this model encourages a holistic view of well-being. It includes physical, emotional, social, spiritual, environmental, occupational, financial, and intellectual health. Managers can use this lens to recognize where stress might be accumulating for themselves or their team; not all burnout comes from workload alone. [Check out this article](#) to learn more about the 8 dimensions of wellness, and accompanying strategies for change and balance.

Complete the Stress Response Cycle

Our bodies naturally experience stress as a cycle or series of steps: being at rest, experiencing tension, responding or reacting, then stabilizing or recovering. Many of us never complete the cycle, which means we get stuck and continue to experience stress. To stabilize, it's crucial to complete the cycle.

There are seven recommended methods for completing the stress cycle:

1. Physical activity
2. Breathing
3. Positive social interaction
4. Laughter
5. Affection
6. Crying
7. Creative expression

For a more detailed explanation, [check out this article](#). Or, find some quick, [actionable recommendations here](#).

Habit Stacking

From James Clear's Atomic Habits, this technique pairs a new wellness habit with an existing routine. Instead of carving out extra time, you simply attach the new behavior to something you are already doing. The old habit becomes a cue for the new habit.

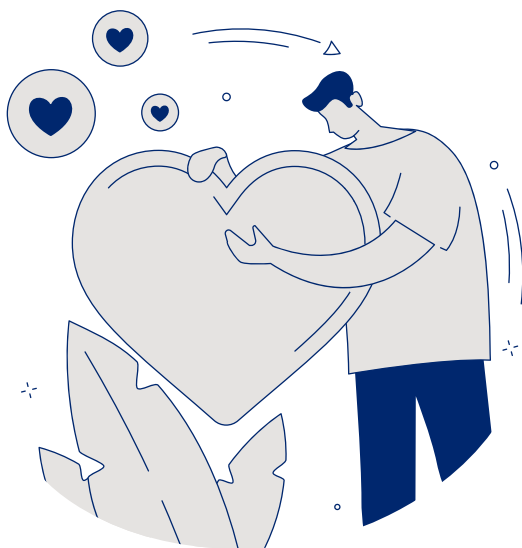
The formula is simple:

After/Before [CURRENT HABIT], I will [NEW HABIT].

Use this to develop new habits to build resilience such as:

- After opening your laptop, take three deep breaths before reading emails.
- After a meeting ends, stand up and stretch before starting the next task.

This builds momentum without requiring a major overhaul. For more about the method, how to build the habit chain, and finding the right trigger, read the excerpt [here](#).





Reflection moment

- Think about your current habits and how they affect your energy, clarity, and focus.
- What routines help you reset? Where are you feeling drained?
- Now, take it one step further. How do your behaviors shape your team's norms? Are you unintentionally modeling overwork or reactive stress?
- Finally, if you are experiencing triggers that drain you throughout the day, how can you pair them with habits that help you reset?

Additional Resources

Book:

- [Atomic Habits](#) by James Clear
- [Set Boundaries](#), Find Peace

Articles:

- ["Tips to reclaim some control in your life-work balance"](#) (Mayo Clinic)
- ["Why is self-care so hard?"](#) by Suzy Reading

Videos:

- ["The power of vulnerability"](#) Brené Brown (TEDx) (20 minutes)
- ["Meditation with Dr. Ellen"](#) (Guardian) (4 minutes)

Paycom resources/courses (Available under the learning tab in your ESS)

- Quick tips for de-stressing
- Unwinding when working remotely
- Using good posture while working remotely
- The 8 Dimensions of Wellness

19. Final Review

Leadership Styles and Emotional Intelligence

Leadership doesn't rely on one fixed style. [Adapt your style based on context and needs.](#)

Transformational leadership

Centers on long-term development, motivation, and vision. Helps teams connect to purpose and push beyond basic expectations.

Transactional leadership

Grounds work in structure, results, and accountability. Reinforces consistency and clear execution.

Emotional intelligence (sometimes called EQ) is a key component of adaptable leadership. [It includes:](#)

- **Self-awareness:** Recognizing emotional triggers and patterns
- **Self-regulation:** Choosing thoughtful responses under pressure
- **Empathy:** Understanding how others experience work and leadership

These qualities show up in how you give feedback, navigate conflict, and adjust communication under stress.



Effective Communication and Feedback

Effective communication is built on active listening and clear feedback.

Active listening means [listening to understand](#), not just to respond. Clarifying questions, paraphrasing, nonverbal cues, and pausing with intention help others feel heard and reduce confusion.

Feedback is most valuable when it is timely, specific, and tied to outcomes. As a manager, giving praise and recognition is just as important as constructive feedback. The **SBI model** ([Situation, Behavior, Impact](#)) offers a clear structure.

Give feedback tied to outcomes, not assumptions, and reinforce psychological safety with active listening to allow team members to feel heard.

Building and Leading High-Performance Teams

High-performing teams rely on more than output. **Strategic leadership** connects the team's work to broader business goals, providing clarity, purpose, and allowing for adaptability. It requires stepping back from execution and creating space for healthy debate and creative thinking.

Align on goals with Objectives and Key Results (OKRs)

OKRs are a great framework for team and department goals. Objectives are qualitative and directional whereas Key Results are measurable milestones and indicators of progress.



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Psychological safety [allows team members to feel safe](#) to question, disagree, or admit mistakes. Without it, ideas stay quiet and risks go unspoken.

Tips to build psychological safety:

- Aim for progress, not perfection. Celebrate the wins.
- Encourage diverse thinking and openness.
- Show vulnerability and transparency.
- Normalize respectful disagreement as part of problem-solving.

Employee Engagement and Motivation

[Employee engagement](#) comes from feeling trusted, seen, and valued. It shows up in ownership, initiative, and willingness to grow.

Motivation is personal and dynamic, often falling into either **intrinsic or extrinsic** categories. Most people are driven by a mix of both.

- Intrinsic motivators include autonomy, mastery, purpose, and personal growth
- Extrinsic motivators include pay, perks, titles, and public recognition

Be conscious of different learning styles

Knowing your team's learning styles helps you delegate, coach, and support growth.

Common learning styles include:

- Visual: prefers diagrams, videos, and charts
- Auditory: learns best through listening and discussion
- Reading/Writing: prefers written instructions and reflection
- Kinesthetic: learns by doing and practicing hands-on

Recognize the right behaviors

Make sure that your rewards and recognition align with the desired behavior more than the outcome. (E.g., rewarding effort, growth, and collaboration reinforces a learning culture.)



Conflict Resolution and Managing Difficult Conversations

Unresolved conflict often turns into resentment or disconnection. Address issues early to turn conflict into productive turning points.

The Thomas-Kilmann model outlines [five conflict responses](#):

- **Competing:** Direct and assertive, used for urgent or high-stakes issues
- **Collaborating:** Ideal when long-term relationships and creativity matter
- **Compromising:** Offers a middle ground when both sides need to move forward
- **Avoiding:** Appropriate for low-priority issues or emotional cooldown
- **Accommodating:** Sometimes helpful for de-escalation or short-term flexibility

Choosing the right approach depends on the situation, relationships, and stakes involved. No style is always right or wrong.

Managers should learn to **spot common resistance patterns**:

- **Active resistance:** Vocal pushback, disagreement, or criticism
- **Passive resistance:** Delay, avoidance, disengagement, or withdrawal
- **Constructive resistance:** Thoughtful disagreement based on experience
- **Compliance (surface agreement):** Saying yes but not following through, doing the bare minimum to avoid conflict

Address resistance proactively to understand the “why.” It’s not always about the event, but often about an underlying concern stemming from fatigue or lack of clarity.

Managing Remote Teams

Remote work requires structure, intentionality, and trust. Without the shared physical space, communication gaps and unclear expectations can slow momentum and impact connection.

Choose the right channel for communication:

- **Async channels** (like email or Teams, that allow you to respond at your own pace) work well for updates and status sharing.
- **Synchronous conversations** (like live meetings or calls) are better for alignment, coaching, and nuance where immediate feedback or discussion is needed.



Mental health matters in remote settings, where isolation and blurred boundaries can go unnoticed. Managers aren't expected to fix personal challenges, but they can help normalize rest, model healthy boundaries, and check in with intention.

Effective [remote leadership](#) includes:

- Clear norms around availability, communication, and decisions.
- Equal opportunity for visibility and input.
- Consistent check-ins and rituals that promote connection.

Reflection moment

Which topic from these six has changed your leadership approach the most? This week, challenge yourself to implement one topic you haven't already.

DEI and Unconscious Bias

[Diversity, equity, and inclusion](#) are connected, but each requires its own focus and effort.

Diversity includes both visible and invisible differences—race, gender, age, communication style, education, and background. A diverse team brings broader ideas, challenges groupthink, and strengthens connection with a wider community.

Equity is about fairness in access, support, and advancement. While equality means giving everyone the same thing, **equity** means giving people what they need to succeed. It's not about preference, but [accounting for differences](#).

Inclusion is about how people experience the team. It's the difference between being invited and feeling like you belong. Managers can watch for signs of inclusion in:

- Who feels comfortable speaking up
- Who gets asked for input or perspective
- Who is included in informal opportunities or decisions

Unconscious bias influences how we evaluate others. These mental shortcuts often happen without us realizing, and they can shape decisions about hiring, development, and trust. The important thing is to be aware of biases. They occur naturally and aren't about intent, but about making quick decisions. It's our responsibility to slow down and make sure we're using consistent criteria and actively seeking different perspectives.

Time Management and Delegation

Time management can be a unique challenge for remote work, where multitasking may seem like a good idea.

Multitasking vs. time-blocking

- Multitasking often feels productive but creates mental fatigue and scattered focus.
- Time-blocking, by dedicating chunks of your day to similar types of work so that you can stay focused, can reduce decision fatigue.

Prioritization frameworks can help when everything feels urgent. Use the **Eisenhower Matrix** (Urgent-Important Matrix) to determine what you should Do first, Schedule, Delegate, or Delete. Here are some additional ways to be [more productive at work](#).

As a manager, **delegation** is one of the most effective ways to make time while supporting growth.

Tips for effective delegation:

- Match tasks with team strengths and development goals
- Be clear about expectations and timelines
- Provide context and support—but avoid micromanaging
- Recognize effort and progress, not just outcomes

It isn't always about offloading tasks, it's about building trust and helping others take ownership.





Change Management

Change can create uncertainty, but it is also a constant part of growth. Managers play a key role in helping their teams navigate change with clarity and confidence.

Change management is the process of guiding people through transitions. It includes preparation, support, and reinforcement to help people adapt and succeed.

Start with a gap analysis. Compare the current state and the desired future state, identifying what skills, processes, and behaviors are needed.

The **ADKAR model** is a [popular framework for managing individual change](#). It breaks the process into five key elements:

- **Awareness:** Help people understand why the change is happening. Awareness sets the foundation for trust and urgency.
- **Desire:** This is the willingness to support or participate in the change. Managers can influence desire by connecting the change to shared goals or personal growth.
- **Knowledge:** Provide clear guidance on the process and expectations.
- **Ability:** This is having the skills to implement the change. Knowledge is understanding what needs to happen, Ability is having the skills to make it happen.
- **Reinforcement:** Consistency helps change stick. Keep reinforcing and assessing the change with feedback and follow up.

As a manager, your role is to communicate the change early and transparently, model adaptability, create space for questioning and learning, and escalate any feedback from your team.

Self-Care for Managers

As a manager, your well-being [doesn't just affect you](#), it often trickles down to your team. When managers model rest and balance, it gives others permission to do the same.

Burnout builds gradually. It often starts with stress and overwork, but continues through lack of support, abandoned PTO, or blurred work boundaries.

The **Health Triangle** is a visualization tool for well-being, focusing on three core pillars:

- **Physical health:** Getting enough sleep, movement, and nutrition
- **Mental health:** Managing stress, setting boundaries, and building awareness
- **Social health:** Making space for connection and asking for support when needed

PTO like a boss. Time off is important, and setting boundaries will help you get the most out of it. Communicate expectations before your PTO, create buffer days around travel, and avoid checking in unless necessary.

Habit stacking is a great way to introduce small wellness habits with an existing routine. Attach a new behavior to a current one using: **After/Before [CURRENT HABIT], I will [NEW HABIT].**

Use this to develop new habits to build resilience such as:

- After opening your laptop, take three deep breaths before reading emails.
- After a meeting ends, stand up and stretch before starting the next task.

Performance Management

[Performance management](#) is an ongoing relationship where managers and employees share accountability. When done well, it creates momentum and growth. When treated as formality, it erodes motivation. A strong approach includes both managing and coaching.

- **Managing:** Focuses on tasks. What needs to be done and when it's due.
- **Coaching:** Focuses on the person. How they're approaching the work, what they're learning, and what support they need.

Check-ins shouldn't just be status updates

Performance management is ongoing. Don't wait for formal reviews to give feedback or reset expectations. Consistent 1:1s are space for alignment and coaching.

Use the GROW model for coaching conversations.

- **Goal:** What do they want to achieve next?
- **Reality:** Where are they now?
- **Options:** What can they try or change?
- **Way Forward:** What will they do, and how can you support?

Finally, set clear growth goals with frameworks like **SMART goals** (Specific, Measurable, Achievable, Relevant, and Time-Bound). Remember, everyone's development, goals, and motivators are different.

Action Item: Personal Development Plan

Your learning doesn't stop here! A manager must adapt and stay connected to the changing workforce. Use this [Personal Development Plan](#) template to help map out your next steps and set goals for your growth as a manager.

Manager Training Series Flipbook

We hope you've found this series useful and will continue to grow in your role. If you need any support or have any feedback, please reach out to hr@BetterHealthpp.org.



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