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Introduction to Line Management – Line Manager Training

Introduction

Line management is often seen as an obvious career step, likely to result in a salary increase and more responsibility. However, you should think carefully before you embark on this path. Being technically very good at your job does not necessarily mean you are suited to being a line manager.

As a line manager you will need to coach, help, support and give direction to ensure others perform to meet the needs and objectives of the organisation, rather than relying on your own technical expertise.

Management can be exciting and rewarding and provide you with a career path with regular opportunities for personal development and growth. However, it is also challenging and requires good interpersonal skills, perseverance, and a learning mindset.

This training sets out what is required to step into line management and what makes a good manager and provides practical guidance for employees transitioning into a managerial role.

The importance of good line managers

Line managers are the interface between the organisation and its people. They are responsible both for harnessing the resources at their disposal to achieve the aims of the organisation and for implementing the organisation's people policies and practices. Good line managers can mean the difference between a happy, engaged workforce, and a demotivated, resentful one - impacting on areas including performance, productivity, turnover, and recruitment and training costs.

Where the organisation is going through a period of uncertainty, be it an international crisis such as the coronavirus (COVID-19) pandemic, or an internal period of change, the line manager remains the lynchpin within the team, acting as a stable influence and guide to team members. During times of change, employees often look to their line manager to help them manage change and deal with pressures that might otherwise have been considered beyond the remit of work, such as an ever-evolving "new normal" where work and home blend.

Line manager responsibilities?

As a line manager, your central role is ensuring, through the work of your team, that the objectives of the department and organisation are met.

Typical areas of responsibility include:

- work organisation and allocation

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- handling budgets and managing operational costs
- recruitment, induction, and probation
- recognition, motivation, and engagement
- performance management and appraisal
- training, coaching and staff development
- managing family and annual leave
- handling flexible working requests
- monitoring and managing sickness absence proactively
- handling disciplinary and grievance issues
- team members' wellbeing; and
- handling redundancies

Attributes of a good line manager

To be a good line manager you need to be emotionally intelligent and have good interpersonal skills and an interest in people and getting the best out of them.

In thinking about the attributes that managers need, it can be useful to think about good managers you have experienced. This helps to focus attention on what others will expect from you.

Talking point

When you think about the best managers that you have had in your career, what attributes spring to mind?

In general, a good line manager:

- is supportive
- is easy to talk to, personable and approachable
- has good active-listening skills
- trusts others as a starting point
- engenders trust and does what they say they will do
- develops people to play to their strengths
- sets goals that are rewarding and that encourage individuals to move outside their comfort zone
- is clear, direct and consistent in their communication
- illustrates the ability to change and adopt new ways of working; and
- manages upwards so that everyone is clear on the expectations of their team

If you do not currently have all these attributes, there will be areas that you need to work on.

It is a useful exercise to consider, based on feedback that you have received both in and out of work, how you would fare against the below characteristics where 1 = not good and 10 = excellent.



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Attribute	Score (1-10)
I am personable and approachable.	
I listen to people and try to see things from their perspective.	
I am aware of my own strengths and the areas where I need to develop.	
I can organise myself and other people/resources.	
I understand what the organisation needs well enough to translate it into actions and direction for my team.	
I set an example in the way in which I react and adapt to changing environments.	
I can motivate other people and be positive even on a bad day.	

As an aspiring manager, you are not expected to score 10 on everything straight away, but to understand where your development areas may lie and be ready to embark on a learning journey.

Managers are incredibly important to performance, morale and engagement, and a poor manager can have significant ramifications for their team and the organisation in terms of results delivered, turnover and recruitment costs, and reputational damage. If management, and learning to be a good line manager, does not excite you, or you feel you cannot be a positive role model, it is better to recognise this early on and take a different career path.

Dos and don'ts

- **Don't** be afraid of admitting you are learning when you first take on your team.
- **Do** be honest with yourself about where you are and the development you need and seek feedback from others.

A new role and new behaviours

A move into line management requires a new skillset and the adoption of some new behaviours.

Whereas once you could join in with office gossip around the coffee machine, you would be wise to question the impact this could have once you are in a management position.

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When a new system or way of working must be taken on board, you will be expected to be a positive force in its implementation and an early adopter. Managers are often seen as the conduit of any change or improvement within their organisation and your attitude in relation to this will be key. Many of you will have experienced first-hand the impact that a positive approach to change can have during the coronavirus pandemic, where good managers showed flexibility and dealt with change at pace and in a positive manner.

Your own emotional resilience is something else to consider. Are you able to support others during times of change and stay well and healthy yourself? It will serve you well to think about whom you will need in your support network to support you.

Sometimes, there are difficult decisions to make and steps to take and, if your own line manager insists that you take a direction with which you are not 100% happy, you will still be expected to drive your team to perform against the targets. Thinking about how you approach this type of issue can give you insight into whether or not management is right for you.

It is also worth thinking about some of the things that you love about your non-managerial job that you may need to leave behind. Technical aspects of your role, being in control of every detail or simply doing the day-to-day tasks may be things that you will need to let go of and delegate, even if you enjoy them.

Talking point

What will you need to stop doing to move into your line manager role and be successful? How will you make this happen?

Many new managers fail because they simply add one-to-one catchups and team meetings to their diary, believing this to be managing, and then carry on with their previous day job, only to find that they are not leading their team to success. A management shift you must make quickly is to realise that your role now is to get the best from others. Your time is better spent leveraging your skills to produce a high-performing team that delivers results for the organisation, not trying to cram meetings with your team into your old day job.

Here we look at some examples of how the role of line manager typically differs from that of a non-manager.

- A non-manager is responsible for their own results. A manager must own their own results and the results they achieve through others.
- A non-manager is often required to complete specific tasks. A manager needs to break down an objective into the tasks required to deliver it and allocate and organise resources (people, materials, etc) to ensure that the tasks are carried out.
- A non-manager may have to complete processes to make the business work efficiently (e.g., filling in a timesheet, clocking in and out, following quality assurance procedures, etc). A manager will be responsible for ensuring that these things are done by others and using any information gathered to manage efficiency. The manager may also have a remit to challenge the processes to drive improvement.
- A non-manager often works at task level. Success will be viewed as getting the right things done, at the right time, in an efficient way. A manager's "world view" is broader



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and often involves deciding what the "right things" are in the first place. They often have to make difficult decisions on priorities when there is too much to do and manage expectations across multiple stakeholders including those of their own line manager, other departments and their team.

Bearing all this in mind, and forgetting the title, any kudos, and any associated pay increase, you should ask yourself if this is the career path that you want to take. You need to think about this carefully and be honest with yourself - once you are in the role of line manager you will owe it to your team to be a great line manager.

Examples of what you might be expected to do as a line manager	Examples of how you might be expected to behave as a line manager
<ul style="list-style-type: none">• Plan and organise resources to meet agreed goals. This will often include recruitment, work organisation and allocation, rota design and reporting on progress.• Set direction for your team and ensure that they are focused on what is important from day to day.• Approve time off for various reasons including doctor's appointments, holiday and bereavement.• Manage performance - including setting objectives, motivating people, coaching and encouraging others to learn, measuring performance (eg appraisals) and handling underperformance.• Set and/or agree a budget and control spend against the budget.• Embrace technology and try new things.• Manage disciplinary and grievance issues. Although this is unlikely to happen often, it may mean dismissing employees where appropriate.	<ul style="list-style-type: none">• Be a role model for the organisation's values. For example, if integrity is a value of your organisation (and for most, it is) gossiping by the coffee machine is not a desired behaviour for a line manager.• Be an ambassador for the organisation's brand both internally and externally.• Trust others and behave in a way that means people trust you.• Challenge processes and contribute new ideas to make things better.• Ask for and accept feedback to make things better and encourage others to do the same.• Encourage others when they are trying out new ways of working.• Adopt a flexible approach to managing people in different circumstances.

Dos and don'ts

- **Don't** think you can just bolt on your manager role to your existing technical role.
- **Do** acknowledge that you now have a fundamentally different role. Whereas you were previously responsible for delivering your own work, you are now responsible for ensuring that your team deliver their work.



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Five focus areas for new managers

Taking your first step into a managerial role can be overwhelming, but there are five key areas of focus that will get you off to a good start.

Get to know your team

It is important that you get to know the individuals in your team. You will be delivering a plan and working with your own line manager to understand and set direction, so you should aim to understand the people who make up the team you have to deliver the plan.

If your new team already have appraisal plans in place, ensure that you have access to these. Where you are taking over from another line manager, ideally there will be a handover that includes a conversation about the goals that have been set for each individual in the team and their progress towards achieving them.

Hold one-to-one meetings with each person in your team to get to know them better. Through these meetings, seek to understand: what motivates them at work; what they have going on in their life outside work; and how to help them work at their best. Find out how they like to work and what is important to them. For example, for some employees, particularly following the coronavirus outbreak and the changes this brought about in how people work, the ability to work flexibly is important. You might want to ask them how they came to work at the organisation. It may be, for example, that the organisation has a social purpose with meaning for them, or they may have ended up there with no real career plan. It is useful to know the background. Try to find out what "gets them out of bed in the morning" with a spring in their step and feeling motivated.

This is an important step in understanding what steps you can take to make sure employees are engaged. Research has shown that where employees are engaged, where they have a sense of personal attachment to their work and the organisation, they are motivated to do their best. Where employees are not engaged, they are likely to be demotivated, which creates a greater risk of them leaving the organisation.

In such uncertain times, line managers are more important than ever in developing, supporting, and retaining talented individuals in the organisation. As more traditional management styles, characterised by a firm and directive approach, ebb increasingly away, and as more of us work flexibly, the need for line managers to listen effectively and build strong relationships based on mutual trust becomes increasingly important if organisations are to manage and retain talent.

In addition to finding out how your team members work at their best, let them know the type of manager you want to be and how you work at your best. Make it clear you welcome feedback so you can make improvements to the way things work.

Aim to identify the skills and knowledge that you have in the team during these early conversations. You will then be able to align these to business objectives to build a high-performing, motivated team.

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If you have been promoted from within the team and have friends (or indeed foes!) in the team, this can present challenges. You may want to add some additional elements to your one-to-one conversations. For example, ask team members how they feel about the change and consider sharing how you feel too. Recognise the strengths that they will bring to your team and acknowledge where you need their help. The conversation may go something like this:

"Thanks for meeting with me today. I'm really looking forward to working with you. I recognise that you have strengths in areas that we need within this team, and I want us to work together to make sure that we use those strengths. I want our team to be successful so it's important to me that I understand how you feel about the recent changes in the team structure. We can talk about them now or when you feel ready, or as and when we feel we need to. Let's have open and honest conversations as we go to make sure this works."

Dos and don'ts

- **Don't** rush in with a management style that is at odds with your personality because you think that you should behave in a certain way.
- **Do** carry out the role in an authentic way that reflects who you are while also delivering the needs of the organisation.
- **Do** be mindful of your team's personal challenges outside work and their wellbeing. While you are not expected to be a counsellor, you will need to know what further help and resources are available if an employee needs additional help. Be open to spotting signs that people may be struggling, particularly during times of change, and refer to HR or your own line manager where needed.
- **Don't** treat old friends more favourably.
- **Do** be fair and consistent in how you treat everyone.
- **Don't** expect everyone in your team to accept you in your new role overnight.
- **Do** recognise that this will be a change for your team, so be patient and give them time to adjust.

Understand expectations

At the same time as taking steps to get to know your team, you should be having conversations with your line manager and getting hold of relevant information to understand what is expected of you and your team. As soon as practical, obtain your job description and any key objectives that tie into your role in the medium, short, and long term. These may not all be written down, and any written documents may not fully articulate what is expected of you, so seek to have the necessary conversations to understand exactly what is expected of you and your team.

Consider reaching beyond your formal network for help. An informal network of people who are in a similar role can provide valuable support.

Dos and don'ts

- **Don't** make assumptions about what is expected.
- **Do** obtain information that will help you to identify what is expected and be aware that there may well be unwritten expectations, e.g., attending a monthly dinner with clients.

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- **Do** seek out the support you need, both practically and emotionally. This is particularly important if you are working in an environment where face-to-face contact is limited. You may wish to set up a buddy arrangement or a regular check-in with members of your support network.

Set your direction of travel

Armed with the information that you have on your team and what the organisation needs you to do, you can begin to align the team that you have with the direction you need to take and the tasks that you need to complete in the short, medium, and longer term.

The results that your team need to produce and the behaviours that they need to model should be clear. Achieving this may mean undertaking an analysis of the people that you need in your team, versus those you have, and identifying any gaps. Depending on the nature and extent of any gaps you may need to take steps to deal with any underperformance or training needs - or even to recruit - to create a team that is able to deliver what is required of it and that operates as a cohesive unit.

You should also be aware of any potential flight risks and be prepared to deal with them. Take steps to ensure employees feel supported and listened to, particularly during times of change. This means communicating with them extensively. If people look to you and the organisation and think they are not listened to or looked after, they could become a flight risk.

Ultimately, this may mean making plans for any potential succession. Be aware that recruitment may take longer if your talent pool is affected by Brexit and take note that role requirements may alter if you have moved to more flexible working practices.

Dos and don'ts

- **Do** keep communicating with your team - listen to their views and take on board their feedback.
- **Do** consider if you have all the relevant information before making a decision and ensure that you have the authority to announce and implement it.
- **Do** ensure that you put together a plan setting out the things that you need to deliver and the resources that you have at your disposal.

Create a delivery plan

Having identified the team that you have and the direction in which you are heading, the next step is creating a delivery plan. You then need to ensure that everyone in your team understands how they fit into the plan. To this end, make sure that your team members know:

- the wider goals and plan of the organisation
- where the team fits into the organisation's plan and the results that the team needs to achieve
- the goals and plan for your team; and



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- their own role as well as that of other members in the team, for example by sharing action lists and job descriptions.

The specifics of what information you share and how you share it will depend on your organisation, but the desired outcome is that everyone knows the goals of the organisation, the team, and the individuals within the team.

You should also communicate upwards and remain agile. Ensure that you check in with your own line manager to ensure that your plan and team remain focused on the right things. This will involve pushing things back at times, managing the expectations of the team and your own manager, and monitoring feedback.

Dos and don'ts

- **Do** work closely with your team so that they jointly own the plan and believe in it.
- **Don't** be afraid to change the plan if the needs of the business change.
- **Do** update the plan as it develops and review it regularly.
- **Do** make sure that your team understand the plan and where they and others fit into it.

Manage your team to deliver

Remember that your fundamental purpose as a line manager is to harness the resources at your disposal to achieve the organisation's aims. These aims will be met only if the individual members of your team are working effectively and competently. As their line manager it is your job to get the best out of the people in your team, and that means providing ongoing feedback and guidance to individual team members as well as quickly addressing any problems with the way in which they are working.

Your organisation is likely to have a formal review process in place, for example a quarterly or yearly appraisal. However, conversations about performance should not be confined to these formal appraisal meetings. Continuously monitoring performance provides you with an ongoing understanding of the strengths and weaknesses of individual team members, and regular, effective feedback on their performance is essential if they are to develop and grow. Most employees respond positively to well-delivered constructive criticism, leading to better performance and increased motivation.

Feedback phrases that are useful to have in mind are:

- What went well? What could we do differently in future?
- What should we stop doing? What should we start or continue to do?
- I notice... (insert observable behaviour)
- I wonder what would happen if... (insert desired behaviour)
- I like it when... (reinforce desired behaviour)

There will undoubtedly be times when you need to manage someone who is not performing to the required standard, and you need to be able to provide honest, timely feedback, even where it is unpleasant or challenging. Having this sort of difficult conversation is a fundamental



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part of the role of line manager, and it is essential that you do not allow a situation to develop where an individual is unaware of their poor performance. Not only will this lead them to assume that they are working to an acceptable standard, but it will also be unfair to the remaining members of the team and potentially have a negative effect on morale and engagement, and ultimately performance.

It is essential to address any poor performance as soon as you become aware of it and set clear objectives and expectations for improvement. Although in many cases it will be possible to resolve the issue through informal advice and support, be aware that there will be times when you need to escalate the performance issues and commence the organisation's formal capability procedure.

Dos and don'ts

- **Do** focus on the right things to drive performance. For example, picking up on spelling mistakes may be nitpicking for one role but a legitimate poor performance issue in another.
- **Do** give tailored and role appropriate feedback. Do this on a regular basis, preferably directly after the relevant event.
- **Do** appreciate that a less experienced member of the team will need different support and direction to a highly qualified and experienced individual.
- **Don't** just hope that an issue with poor performance will simply go away or that you can work around the issue without addressing it directly. The longer poor performance is left unaddressed, the harder it will be to resolve.
- **Do** aim to engender a feedback culture in your team with the intent of genuine improvement. Work to get yourself into a position of trusting the team and them trusting you.
- **Do** be mindful of any mental health challenges that arise for your team members and deal with them sensitively and as appropriate in accordance with organisational procedures. A challenge that an individual might have found straightforward previously may, during times of change or under stressful conditions, seem overwhelming. Where needed, seek support from your HR team or your own line manager to help navigate challenges such as these or to obtain a second opinion.

Relationship with HR

Too many line managers regard people management as an element of their role to be tacked on to their day job or to be handled by HR - they fail to appreciate that managing people, and all this involves, is what their day job now is.

As a new line manager, you will not necessarily have all the skills, knowledge and experience you need to manage effectively, and it is HR's role to provide the support, coaching and training you need to develop into the role. They will also provide ongoing support and guidance in areas including recruitment and selection, team training and conflict management. However, it is key that you understand that HR are not there to manage your team for you - the people management role, and all the ongoing monitoring, documenting/reporting, feedback,



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performance management, relationship-building, and employee development that this entails, belongs to you.

Ensure that you know enough about any support or benefits in place for your team members to support them in maintaining their wellbeing. For example, does your organisation have an employee assistance programme in place, or additional benefits such as healthcare support that can help people during difficult times? You should be in a position to refer people to these resources where needed.

Your learning journey

You may have identified gaps in your knowledge or skills or recognise that it may be helpful to understand your own work-style preferences.

The starting point in many management development programmes for new and aspiring managers is to get feedback and begin to build self-awareness as a springboard for personal growth. If you have an opportunity to undertake psychometric testing to understand yourself better, this is a great place to start. Asking for feedback from colleagues against the criteria and characteristics identified in this training is also a useful exercise, so that you can start to understand the skills that you need to develop.

Ensure that you make time to step back, think and build your own skills. You will almost certainly not get things right all the time, but resilience and the ability to reflect and learn from mistakes will stand you in good stead. Aim to be positive and transparent with your team throughout. Learn from feedback and embrace your new role, always striving to be the best line manager you can be.

Talking point

Managers have a significant impact on how employees feel about the workplace. As a manager, you will be responsible for how your team feel about their work and their results. What makes you excited about the challenge? What concerns do you have?