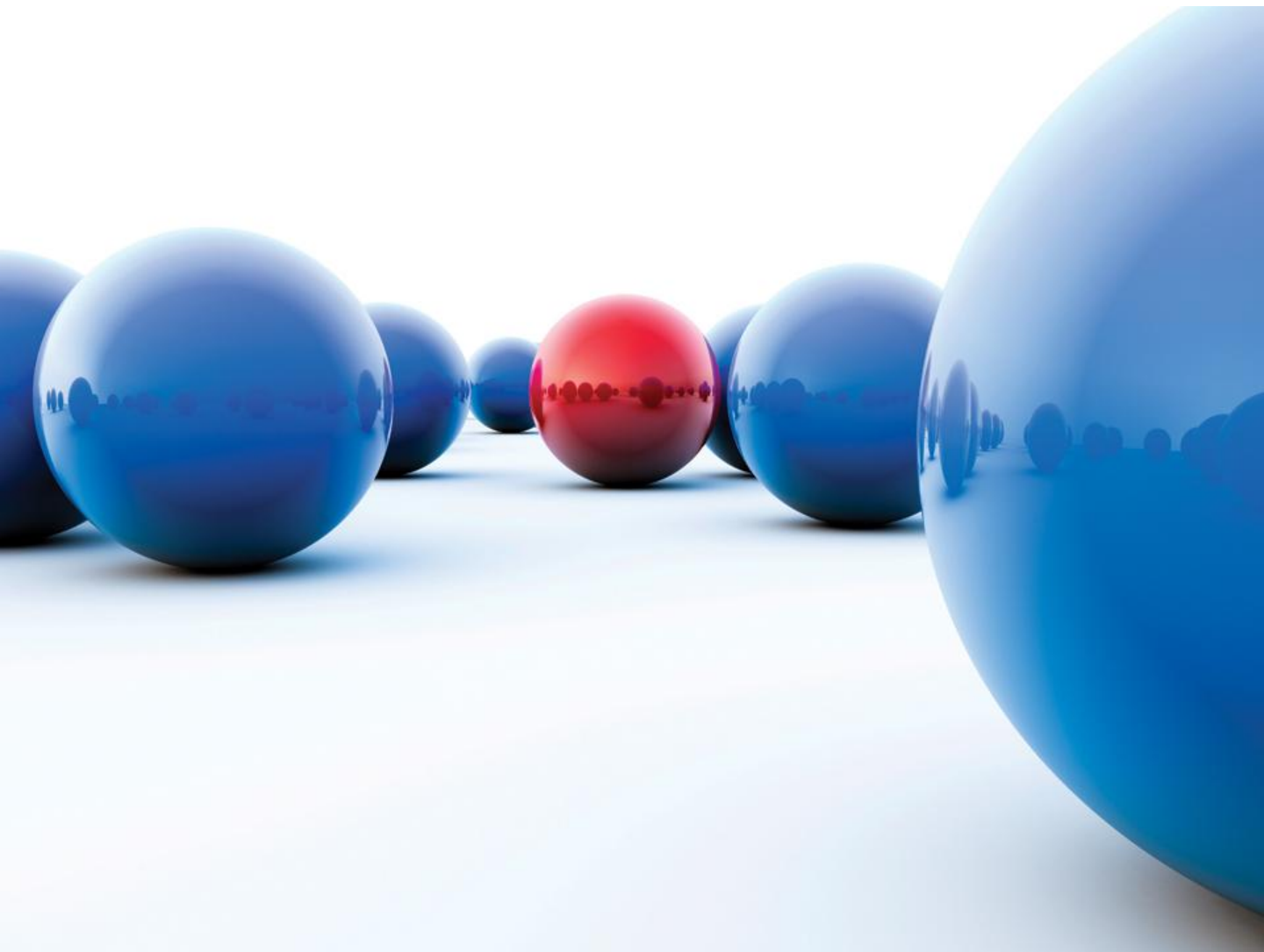


Explorations into Leadership

Overview



Introduction

What is Explorations into Leadership?

Explorations into Leadership is designed to help you decide whether or not managing others is a path you want to pursue. The process is self-directed with materials to guide you through information, experiences and reflection.

Throughout this program, you'll be working closely with your manager, informal mentors and anyone else from your career audience who can assist you with feedback and input along the way. You will meet monthly with a facilitator and a group of other participants to share your learnings and learn from others.

If you determine that moving into a management role is a step you would like to take, this process will give you development actions so you are prepared to interview for management opportunities.

"Leading is a paradox. It's either/or it's both/and."

Paul Allaire

Message from senior leadership

Congratulations! You have decided to explore the role of manager at Corwin Learning Solutions. Leaders build the future, make things happen and inspire others.

This program, **Explorations into Leadership**, is an excellent career development opportunity to determine whether a formal leadership role might be right for you. Take advantage of the opportunity that this program affords to actively manage your career and create new networking connections.

I wish you the very best in this endeavor.

3-dimensional management

Managing others can be extremely rewarding. As with any role, managing can be very challenging.

In order to give you a thorough look at reality, we have divided this experience into three dimensions.

Managing yourself

Moving from individual contributor to manager entails changes in responsibilities and relationships. Managers have personal workloads in addition to managing their teams.

Managing others

Managers are responsible for the results of their departments. They accomplish these results by leading and engaging others.

Managing within Experian

Managers lead within the larger context of the organization and Experian corporate requirements and processes.

Explorations into Leadership

Guide 1: Managing yourself



Explorations into Leadership

Guide 2: Managing others



Explorations into Leadership

Guide 3: Managing within Experian



As you move through the program, you will receive a guide for each of the three dimensions.

Explorations into Leadership

Guide 1: Managing yourself



Welcome

Welcome to Guide 1: Managing Yourself

You're going to learn about the changes in attitude and action that need to occur before someone can effectively lead others. You probably already know that the skills which make people great employees are not the skills needed for success as a manager. In this guide, you'll learn about the role of first-line leader, have an opportunity to talk with other people, record your observations and end with a check-in meeting with your program facilitator and the other participants in your group. By the time you complete this module, you'll have a very good idea about the personal transition needed to become a first-rate leader.

Becoming a manager is rewarding, challenging and sometimes unsettling. According to Stephen Drotter in [The Leadership Pipeline](#), this personal transition requires **three changes** in thought and action...

1. The **skills** that make you successful are different

As an individual contributor, your success depends on specific knowledge of your job. You are probably experienced in doing the work and have some deep expertise. As a manager, you need excellent skills in leading others and a more generalized knowledge of your team and business area.

2. How you use your **time** changes

As an individual contributor, you manage your own time and use time to complete your own work. As a manager, you use time to manage the team. Most CLS managers carry an individual workload, too. You need to complete your own work and also help others perform effectively.

3. What you **assess** expands

As an individual contributor, you value getting your work done through personal effort and you assess your personal success. As a manager, you shift to getting the work done through others and assess the success of the team and direct reports. As a result, your work values will shift to align with this broader responsibility. Another shift relates to the transition from peer to manager. As an individual contributor, you are one of the team – a colleague, pal and friend. As a manager, you must form a new relationship with your former peers and re-establish yourself as leader of the team.

Activity 1 – Setting and managing priorities

Through the use of tips provided in an online course, you will have the opportunity to practice using a variety of prioritization skills. On the job, we all interact with other people and evaluate information presented through phone calls, e-mails and supporting documents. This requires you to sift through information, identify concerns and make choices and judgment calls that will have business consequences later on.

Prioritizing is an essential skill for any manager. Resources must be balanced between numerous goals, and tasks aligned with strategic vision and corporate values. To achieve these objectives, it's important to understand the distinction between importance and urgency when setting and managing priorities.

Directions

In our CLS LinkUp LMS, complete the course '[Brain Bites: Time Management](#)'
This course will take you approximately 15 minutes to complete. This course contains downloads that you can use back in your job. Take advantage of them.

How will these tips help you to better prioritize your work? Why?

What challenges do you anticipate that may prevent you from being successful?

How will you prepare for the meeting with your manager to review your choice of priorities?

Insights

What did you learn about setting and managing priorities?

Activity 3 – You make the call

Read the situation below. Put yourself in the role of the manager, then answer the questions at the bottom of the page. Discuss your answers with your manager and get feedback on your responses.

So now I've got TWO jobs?

You have just been appointed as a first-time manager and you are beginning to think you never should have accepted the appointment. Sure, it's nice to be recognized, but you didn't figure on having to do TWO jobs at the same time.

You have always been the "expert" in the group on the tough issues. Everyone comes to you for help and, secretly, it feels pretty good to be "the wizard" - but that's getting old these days.

Your manager keeps asking you to do things for her and your team is constantly asking you questions that you think they ought to know the answers to. Plus, you've got other tough issues piled on your desk and now you have no time to get to them!

Between your in-basket, questions from your team, as well as your own work, you're exhausted and wondering what the heck you were thinking in the first place!

What's the issue?

What is your responsibility here?

What resources can you consult?

What actions will you take?

Insights

What did you learn from this scenario about balancing your own projects with managing others?

Explorations into Leadership

Guide 2: Managing others



Welcome

Welcome to Guide 2: Managing others

This guide is about the heart of managing – the responsibility of accomplishing goals by supporting others. From the outside looking in, managing can appear easy. We often hear people who are not in management talk about how managers could do a better job. When done well, managing others appears easy. The reality is that it takes practice and skill.

As a manager, you are responsible for managing people and performance. Performance means that you are clear about your expectations, you define what a “good job” looks like, and you know how you’re going to measure good performance. This is called “the performance cycle.” Something to consider: how employees accomplish a task or goal is as important as getting it done. (For more information about the CLS Performance Review process, review the [CLS LinkUp Performance page](#).)

As a manager, you take on different important roles throughout our Performance process. Your various roles help you direct reports to:

1. Plan

- Understand CLS and business unit goals
- Set and communicate challenging department goals that are motivating
- Obtain resources

2. Assign

- Match team talents and development needs to goals, projects and tasks
- Set individual goals with team members
- Delegate for development and task completion

3. Coach

- Coach for development
- Improve performance
- Provide feedback

4. Engage

- Motivate and retain talented people
- Get superior results
- Create a great place to work

Activity 1 – Manager interview

Identify a manager you respect or admire as an exceptional leader of others. Please select someone *other* than your own manager. Make an appointment to interview the person. Learn how they think about people leadership.

Here are some questions to get you started:

What are the highs and lows of managing people? Have you learned any “truths?”

Plan – How do you establish your department’s priorities each year? What do you do if you don’t believe you have enough resources to accomplish the goals?

Assign – What do you consider when you match people with assignments or tasks?

Coach – What do you think it takes to help people do their best work? How do you coach the people on your team?

Engage – What’s your department’s culture or climate? How did you create it and how do you maintain it?

Make the most of your time and theirs

Schedule time and find a place where you can focus on the conversation.

Explain why this interview is important to you.

Listen more, talk less.

Thank the interviewee for taking the time to speak with you.

Insights

What was my major learning from this interview?

Leadership Simulation: Managing Performance

As a manager for *Leading Lenders*, you are asked to lead a team through change, coaching them to align with the new goals and priorities. Your job is to manage the team dynamics while driving toward a more performance-based culture. Your challenge is to do this while keeping your team members motivated and productive.

You will have three metrics demonstrating how the choices you make affect these three areas, with a possible 55 points in each of the three areas. How did you do?

Performance Metric	My Score	Possible Points
Satisfaction/Trust		55
Organizational Alignment		55
Productivity		55

How does a manager show they own team mistakes and misunderstandings?

When a person on a team focuses more on their own goals than on the project goals, it can cause tension on a team. What are some ways you can create self-awareness?

What should a manager consider in order to support new goals, priorities, policies, etc. and create alignment of those with their team?

Explorations into Leadership

Guide 3: Managing within Corwin Learning Solutions



What's inside

Message from senior leadership
 Welcome and becoming an agent of CLS
 Activity 1 – Learning from your manager
 Activity 2 – You make the call
 Activity 3 – Manager interview
 Activity 4 – Your new network
 Activity 5 – CLS Leadership Behaviors
 Meeting with the program facilitator and participant group
 Action plan
 Development actions
 End of program summary
 Career Savvy
 Notes

"Don't wait until everything is just right. It will never be perfect. There will always be challenges, obstacles and less than perfect conditions. So what? Get started now."

Mark Victor Hansen

Message from senior leadership

Every company has a distinct culture and specific corporate expectations of managers; our company is no different. Corwin Learning Solutions values managers who are outstanding corporate citizens.

What is a "corporate citizen?" You already know that CLS operates within many legal and regulatory guidelines. What you may not know is that when you become a manager, you are considered an agent of the company – you are now acting on behalf of CLS and your actions are interpreted as the company's actions. To be effective, you must know and operate within a wide variety of policies and procedures.

But this representation is only one component of corporate citizenship. CLS also expects that managers have fundamental business skills and operate using company guidelines to set goals, manage budgets and engage in performance management. A huge key to management effectiveness is creating positive relationships with your business partners throughout the company.

This is also the final guide in your [Explorations into Leadership](#) process. We hop that this has been a positive experience for you. Whether or not you decide management is your career path, we appreciate the initiative and time you have taken to thoughtfully consider the choice.

Welcome

Welcome to Guide 3: Managing within CLS

This guide is about your responsibilities to the corporation and CLS stakeholders – customers, shareholders and employees.

Managers lead within the larger context of the organization and corporate requirements. For people transitioning into management roles, this means that you are expected to know and use our policies and procedures for budgeting, performance management and daily activities.

Representing CLS as a manager

As a new manager, your relationship to the company has changed slightly. You are now asked to act on behalf of the best interests of CLS in any decision you make or action that you take. In other words, you are an agent of the company. You are the company to your work group. What you do and say reflects directly on CLS. You are expected to represent the company's best interests in your words and actions.

CLS expects managers to own and take accountability for communicating to their departments in a way that is consistent with management and corporate directives. Individual contributors (non-managers) can voice personal beliefs and have it considered a "personal belief." A manager's opinion or statement is considered to be a company opinion.

"Running an organization is easy when you don't know how, but very difficult when you do."

Price Pritchett

Welcome

CLS Management Responsibilities

These are the company-specific processes that managers are expected to know and use:

- Performance management, including objective setting
- Daily activities (client deliverables, work assignments, etc.)
- Owning communication for corporate initiatives
- Budget creation, tracking and management
(note: budget responsibilities vary by department)

Which of our operating or legal policies have the greatest impact on your department?

To succeed as a manager, you need to be on top of:

What people might not tell you

Good managers have crystal clear focus on their fiscal year objectives

They know that objectives are a magnet for accomplishment. They discuss and assess team progress toward objectives – early and often. They help their teams take ownership of department objectives by making sure the team’s “fingerprints” are on them.

Good managers avoid performance management surprises

They do this by communicating early and often. Their team members wouldn’t be surprised if they could read their manager’s mind because the manager is candid and caring with feedback.

Good managers create and communicate the value of their departments

Yes, they maximize their budget resources, but they know that demonstrating value is the #1 predictor of their team’s success.

Activity 2 – You Make the Call

Read the situation below. Put yourself in the role of the manager, then answer the questions on the following page. Discuss your answers with your manager and get feedback on your responses.

It's cost-savings time again

You are the new manager for a group of experienced employees. Before being promoted last month, you were a peer to these employees. They generally like you and respect you.

Today you attended your managers staff meeting and receive the information that everyone in your department has to take a certain number of PTO days by the end of the fiscal year. The purpose for mandatory PTO is to reduce costs and meet fiscal goals; doing so improves our financial performance. This has been used as a cost-savings measure in previous years.

You know three important things:

1. Your group is experienced and knowledgeable about taking mandatory PTO.
2. Your manager wants all employees to determine their specific days off within the next week to ensure that your group is in compliance.
3. Your employees may react negatively to the mandatory PTO policy.

From your perspective, you anticipate that your team may ask for a special exemption. You consider asking your boss if this is okay. Should you?

All in all, you wish you didn't have to face your team and tell them they have to take PTO. In fact, you wish you didn't have to use up your PTO days either!

Activity 2 – You Make the Call (continued)

What's the issue?

What is your responsibility here?

What resources can you consult?

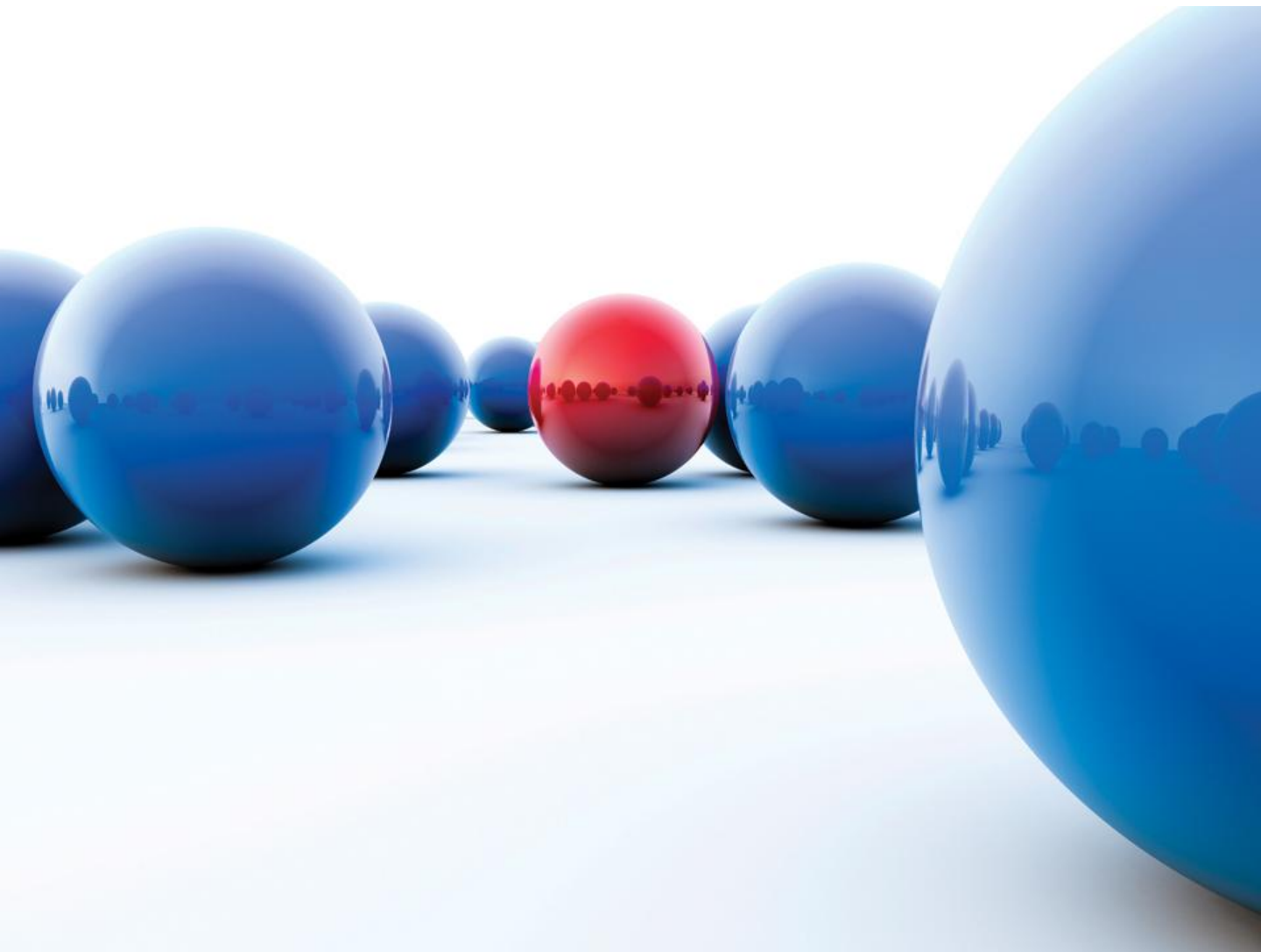
What actions will you take?

Insights

What dilemmas and opportunities did you see in this case?

Explorations into Leadership

Manager Guide



The Program

90 days is the suggested time frame for completion

Roles

Participant	Complete the materials, exercises, schedule meetings and interviews, attend group meetings held by the facilitator, reflect on the learning, share with your facilitator and group, and stay focused.
Participant Manager	Provide feedback and input, meet to discuss the process, participate in some assignments, assist your employee in making necessary contacts, and offer ideas.
Facilitator's role	Function as a safe sounding board; help the participant make meaning of their work in each guide. Debrief assessments and activities with participants in your assigned group.

Your role as coach As the manager of a program participant, you have a critical role in helping your employee gain insight and development. You will find it helpful to:

- Discuss the strengths, development needs, and career aspirations of your employee.
- Find growth opportunities and learning assignments in your employee's day-to-day work.
- Make sure your employee has the benefit of your candid, honest, timely, and actionable feedback.

Learning Styles

Explorations into Leadership utilizes proven principles of adult learning. To that end, activities have been built around three approaches to learning: people learning, information learning, and action learning. People learners benefit from the interviews and outreach to others; information learners appreciate the assessments; and action learners benefit from next steps and actions.