



HR Examiner

*Examining practical HR issues business owners
and managers encounter every day*

From Buddy to Boss

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Setting Boundaries

The key is to build on the relationships you have as buddies while setting clear boundaries for what is now inappropriate as boss. You now have new accountabilities, so previous relationships rarely remain the same.

Here's a list of items you might want to discuss with your former buddies:

The Organizational Perspective

I recently conducted a half-day training seminar I call From Buddy to Boss. We deliberately kept this public seminar contained to a small group of attendees to allow for more interaction and were pleased when weeks ahead of the program, we had a waiting list for the June 6th repeat session.



The attendees at the seminar comprised a wide variety of industries, from non-profits, to public sector, to for-profits. But they all had one thing in common – they'd been promoted to supervisory positions and needed assistance in making the

▶ The change in your role and relationship: How you plan to balance the relationship from the past and the relationship for the future? You may separate the overly social from the workplace and restrict it to after hours and weekends to help delineate the roles. This might mean that you don't talk "shop" during off hours and don't talk personal during business hours, so the lines are clear.

▶ How you will be acting differently: Define how you will be supervising them, how often you'll meet, what your performance expectations are, etc. You may be establishing new rules - changes from the previous supervisor. Give them the heads up on your intentions.

transition.

So what is it about our organizations that promote employees into management roles yet fail to help them succeed? We assume that just because employees are good at performing their job and are ready for a greater challenge, that they innately possess supervisory skills. Basically, we make it hard for our fledgling supervisors to succeed.

So let's start with how to transition our new bosses. Think back to the most recent internal promotion in your organization. Once you selected the best candidate, how did you announce the promotion? (a) Did the person quietly slip into the new role unobserved? (b) Did you announce the promotion formally to the team/department? (c) Did you announce the promotion throughout the organization?

If you answered "c," you're on the right track. It's important that the organization celebrate the success and promotion of the new employee. Not only does it further the reward, it sets the stage for the person's role. It clears some of the barriers to a smooth success because the organization has shown support for the person and their new responsibilities.

So you've made the announcement. Now, what have

▶ Confidentiality 1: how you plan to handle the personal information you acquired previously as their buddy and the boundaries for personal information in the future.

▶ Confidentiality 2: that you cannot share everything with them about other employees, confidential decisions, etc.

▶ Accountability: Your job is to make sure all employees perform to their maximum. That means if your "buddy" doesn't meet your performance expectations, you will inform him/her of the facts. This won't be easy, but it's a must for you and them to succeed.

▶ Communication Style: Buddy comments may not be appropriate with the

you done to pave the way in the employee's department? Were there other coworkers (buddies) who also wanted the position who are now upset that they were denied the opportunity? This is typically ignored but can be somewhat resolved if the exiting manager or the next level manager communicates openly and clearly with the rejected and non-rejected employees. Let them know that it was a difficult decision, but that you fully support the new manager and expect them to do the same. Reinforce the strengths of the individuals and the team showing how you value them and how important they are to the organization's and team's success. More often, we merely make the managerial change and forget that the employees also have recognition and informational needs related to the change.

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Now for the Manager

Ready, set, go!!!! It seems so easy to get the new manager off and running, but we all know that's not the case. The first thing the Buddy, now Boss, needs to do is make a re-entry into the department. I recommend the Boss meet one-on-one with each former buddy to discuss what the employees need from their new supervisor. The Boss needs to play consultant and make sure he or she is not making

Boss. So, bring these out into the open. Let them know that you'll be cautious in how you make the transition.

Additionally, remind them that conversations need to be respectful and perhaps less playful - depending on how you "played" previously.

- ▶ Ask for their patience as you learn. You will be establishing yourself and perhaps will make a mistake or two. Ask for their feedback to help you succeed and don't forget to apologize when you've made an error. Genuine apologies along the learning curve go a long way in building honest relationships with your new employees.

Good luck!

Quick Links...

assumptions about the department's needs or the individuals' needs.

Even if you know all the answers, if you ignore the input of the new team and fail to ask their opinions, perspectives, professional objectives, recommended changes, etc, you're missing out on a huge opportunity to build new relationships and set the stage for supervisory success.

In this discussion, you should also discuss how you plan to supervise and manage. You should have an image of your intended style and a plan for implementation. For example:

- Individual Meetings: How often will you be meeting 1:1 with each employee? Weekly? Bi-weekly? Monthly? It's important that you develop and strengthen these relationships with "formal" update meetings. Not only will rapport be enhanced, but it will also make performance review time much easier. Be sure to create a routine agenda for these meetings so everyone knows what to expect.
- Department Meetings: How often are these meetings? What is your objective for these meetings? What wasn't

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communicated when you were buddy, that now you'll communicate in a timely manner? If your predecessor didn't conduct meetings, this is your time to shine. But only if you structure them wisely and productively. Most importantly, don't brush them off. We've all seen managers who schedule meetings, but then find something more important to do. While something else might pop up periodically on your schedule, if you view this as sacred time with your team, so will they.

This is just a start. There are so many more steps Buddies need to take to succeed as Boss. Make sure you have a clear understanding of your responsibilities, the expectations your manager has for you, and knowledge of your role in the organization. Frequently, organizations assume you know all this. Don't make assumptions.

Also, ask for help. Is there someone in the organization who's been through a similar experience who can mentor you? Don't let your boss assume that you can magically succeed without some guidance and education. Of course, if you're looking for a great program with other new bosses, call or email me so I can add you to our attendance roster for a repeat of From Buddy to Boss on June

6, 2007.

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