Peer Today, Boss Tomorrow
Navigating Your Changing Role

Self-Study Workbook
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>1</td>
</tr>
<tr>
<td>The rock-bottom benefits are</td>
<td>2</td>
</tr>
<tr>
<td>You will know how to</td>
<td>3</td>
</tr>
<tr>
<td>You will experience</td>
<td>4</td>
</tr>
<tr>
<td>Step 1: Pre-Guide Assessment</td>
<td>4</td>
</tr>
<tr>
<td>Step 2: Getting Focused</td>
<td>6</td>
</tr>
<tr>
<td>Step 3: Video</td>
<td>9</td>
</tr>
<tr>
<td>Step 4: Strategy #1 – Accept Your New Role</td>
<td>14</td>
</tr>
<tr>
<td>Step 5: Strategy #2 – Set Clear Boundaries</td>
<td>19</td>
</tr>
<tr>
<td>Step 6: Strategy #3 – Communicate</td>
<td>25</td>
</tr>
<tr>
<td>Step 7: Strategy #4 – Take Action</td>
<td>37</td>
</tr>
<tr>
<td>Step 8: Focus on the Future</td>
<td>41</td>
</tr>
<tr>
<td>Step 9: Post-Guide Assessment</td>
<td>44</td>
</tr>
<tr>
<td>Step 10: Summary</td>
<td>46</td>
</tr>
<tr>
<td>Step 11: Self-Study Guide Evaluation</td>
<td>47</td>
</tr>
</tbody>
</table>
Introduction

Peer Today, Boss Tomorrow is designed to help you make a successful transition from “coworker” to “manager” or “supervisor.”

Making the leap from peer to boss is never easy. New managers frequently struggle to balance their old coworker relationships with their new management responsibilities.

Peer Today, Boss Tomorrow presents four proven strategies that will help new supervisors navigate those changing relationships and prepare for the most difficult situations you are likely to encounter as you assume your new role.

The four key learning strategies are:

- Accept your new role
- Establish clear boundaries
- Communicate
- Take action

You will learn how to address these common situations:

- Overcoming the fear of lost friendships and lost rapport
- Disciplining a former peer
- Managing coworkers who are older
- Enforcing a policy the individual may have personally broken prior to becoming a manager
- Avoiding the appearance of favoritism
- Keeping confidential information confidential
- Admitting mistakes in a way that builds trust and credibility with former peers (and all direct reports)
The rock-bottom benefits are...

Here are the benefits of this course for you and for the organization:

For you:

- Reduces stress and frustration—you will have the competence and confidence to make a successful transition to your new role.
- Increases efficiency and effectiveness—you will be armed with knowledge and skills that will help you do the right thing, in the right way, at the right time.
- Builds respect and recognition within the organization—you and your employees will be able to maximize your opportunities for career advancement.
- Promotes job satisfaction and personal satisfaction.

For the organization:

- Become an employer of choice—employees actively seek out and stay with an organization that has a reputation for employing competent, caring managers.
- Attract and retain loyal customers—skilled managers translate into motivated employees, and motivated employees translate into satisfied, loyal customers.
- Improve productivity while minimizing the potential for lawsuits—competent managers have the ability to develop and maintain a workplace based on respect and trust, and they have the skills needed to address situations before they escalate into disruptive violations of law and policy.
You will know how to...

At the end of the course, you will be able to:

- Explain your role of supervisor
- State how the role of supervisor is different from that of a non-manager employee
- Navigate your changing role by applying four strategies to help your transition from peer to boss
- Develop an action plan to put the four strategies into action back on the job
You will experience...

- A video demonstrating four strategies that a newly promoted supervisor can put into practice to make the transition from peer to boss go more smoothly.
- A variety of exercises to develop and reinforce skills.
- Planning tools to use skills back on your job.
- Pre- and Post-Assessments of what you have learned.

Let’s Get Started!

The Self-Study Guide will lead you through incremental steps to learn how to transition into your new role of supervisor more confidently and effectively.

Be sure to take frequent breaks so that you don’t become brain dead; but also be sure to come back to the guide quickly, so you don’t lose your train of thought!

STEP 1: Pre-Guide Assessment

Complete the Pre-Guide Assessment on the next page to assess your current knowledge and skills regarding the role of supervisor. When you have completed all Steps in the Guide, you will be asked to complete a Post-Guide Assessment. When you compare your Pre- and Post-Assessments, we trust that you will have improved your knowledge and skills.
Pre-Guide Assessment

For each statement below, circle the number that reflects the level of your skills and/or knowledge regarding the role of supervisor. Remember, there is not a secret document that has the “right” answers. The “right” answers are what you believe your skills and knowledge are.

- I am able to explain the purpose of the role of supervisor.
  
  High  4 3 2 1     Low

- I can distinguish specific ways in which the role of supervisor is different from the role of a non-manager employee.
  
  High  4 3 2 1     Low

- I recognize all the changes in my duties, relationships, and accountabilities in my new role as supervisor.
  
  High  4 3 2 1     Low

- I am able to define clearly my new working relationship with my employees.
  
  High  4 3 2 1     Low

- I can describe the appropriate communication techniques to send and receive messages effectively.
  
  High  4 3 2 1     Low

- I can identify the right steps I must follow to get the results I need.
  
  High  4 3 2 1     Low

Move to Step 2.
STEP 2: Getting Focused

In Step 2, you will prepare for viewing a video about a newly promoted supervisor. Begin your preparation for the video by responding to the questions that follow.

- How is the role of “boss” different from your role when you were a non-manager employee?

- How do you feel about your new role as supervisor or your upcoming promotion to supervisor? Read through the list below and put a checkmark (✓) in the box next to the words that describe how the new role of supervisor makes you feel right now. Mark all the words that apply. Then, on the blank lines following the list, write any additional words not included in the list that describe how the role of supervisor makes you feel right now.

The new role of supervisor makes me feel...

- Happy
- Overwhelmed
- Excited
- Frustrated
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deserving
- Deservi...
• What do you notice about the words that you checked? Are they mostly positive? Mostly negative? Are they mixed? Write down your observations about your list.

• Based on your observations of the list of words above, what does this say about how you feel right now about your new or anticipated role as supervisor?

• What concerns or issues do you have now that you're a new supervisor, or what concerns do you have about your upcoming promotion? Make a list of your concerns or issues in the left-hand column below. (Leave the right-hand column blank for now.)

<table>
<thead>
<tr>
<th>Concerns/Issues</th>
<th>Ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
It is natural to have some mixed feelings and concerns as you take on your new role as supervisor or think about your upcoming promotion. In fact, these feelings and concerns are not unusual when anyone anticipates or goes through a change of role or responsibilities, even when the change is something you welcome.

Before you were promoted, your value to the organization was measured by what you as an individual could do successfully on the job. Now your value to the organization will be measured by how well you can help others be successful. That’s the biggest difference between a supervisor’s role and the role of a non-manager employee.

The new role of supervisor isn’t easy: you have to deal with new responsibilities, like hiring, firing, disciplining, developing employees, and leading; you’re working harder because you have to manage your own tasks at the same time you’re supervising others—a little like being a “player-manager”; you’re putting in longer hours; you’re dealing with your own feelings; and you’re facing the reactions of former peers and the changes that have taken place in your relationships with them.

Fortunately, the strategies you will learn through the self-study guide will help you transition into your new role successfully and add value to the organization by helping others be more successful.

**Move to Step 3.**
**Step 3: Video**

In Step 3, you will watch a video that will present a newly promoted supervisor, Terrence, on a trip with several friends. During the trip, the news about Terrence’s promotion gets out, and his friends all share their “words of wisdom” that he could use to increase his confidence and skills in his new role.

Read the “Video Observation Form” information on the next several pages. The questions cue you on what to look for when watching the video.

Play the video all the way through (or feel free to stop the video after each situation to collect your thoughts and to write your notes.) If you choose to stop the tape frequently, look for the following signs to help guide you:

1\textsuperscript{st} stop: Fuel Sign
2\textsuperscript{nd} stop: Guest Check
3\textsuperscript{rd} stop: Blue directional sign
4\textsuperscript{th} stop: Green mileage sign

Obviously, you can replay the videotape as often as necessary to respond to questions on the “Video Observation Form.”
**Video Observation Form**

Terrence’s friends offer many pieces of advice based on their own experience and their observations of successful new supervisors. What were some of the ideas that Terrence’s friends offered him? How could the ideas help a new supervisor? Write your answers in the appropriate space below. One idea is already filled in to help you get going.

<table>
<thead>
<tr>
<th>Idea/Advice</th>
<th>How It Could Help a Supervisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treat people with respect.</td>
<td>Builds trust and teamwork.</td>
</tr>
</tbody>
</table>

...
The advice that Terrence's friends offer him can be summarized into four main strategies, which are in the left-hand column below. In the column labeled “What It Means,” write down some thoughts about what each strategy means for a new supervisor. Then write the reasons that the strategy is important to the success of a new supervisor in the column labeled “Why It’s Important.”

<table>
<thead>
<tr>
<th>Strategy</th>
<th>What It Means</th>
<th>Why It’s Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1: Accept Your New Role</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#2: Set Clear Boundaries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#3: Communicate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#4: Take Action</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After you’ve finished these two exercises, compare your notes with the suggested answers on the next page.
Advice and ideas for new supervisors:
- Accept the change.
- Be up front and honest with people.
- Don’t expect your relationships not to change.
- Be yourself.
- Don’t let your feelings get hurt.
- Admit mistakes.
- Don’t pull any punches.
- Stand your ground.
- Help others to be more valuable.
- Use clear communication.
- Don’t play favorites.
- Don’t wait for things to happen.
- Do what you say you’re doing to do.

How the advice and ideas can help a new supervisor:
- It would help you focus on the future.
- It would allow you to gain credibility as a manager.
- It would help others trust you in your new role.
- It would reduce the chance that your new employees will “test” you.
- It would help you establish yourself as “the boss.”
- It would help you gain the confidence of your former peers/new employees.”
- It would help you get off on the “right foot” with everyone.
- It would send a message that you’re there to support your employees.
- It would help you set new team norms.
- It would establish you as a “fair” boss.
- It would minimize confusion.
- It would help others perform at their best.
- It would help you get things done, which would help your manager feel like he/she made a good choice in promoting you!

The four strategies:

<table>
<thead>
<tr>
<th>Strategy</th>
<th>What It Means</th>
<th>Why It’s Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1: Accept Your New Role</td>
<td>Understand that your responsibilities have changed and increased and that your relationships with former peers are different now.</td>
<td>Establishes you as the boss; helps you deal with the change; helps you get on with doing the new job; helps your self-esteem.</td>
</tr>
<tr>
<td>#2: Set Clear Boundaries</td>
<td>Make sure that your new employees understand the rules and limits of your new working relationship with them.</td>
<td>Establishes the rules for working together so that things go more smoothly; establishes you as being in charge.</td>
</tr>
<tr>
<td>#3: Communicate</td>
<td>Send clear messages and listen effectively.</td>
<td>Allows for clarity of direction, responsibilities, expectations, and information.</td>
</tr>
<tr>
<td>#4: Take Action</td>
<td>Take the initiative to get things done.</td>
<td>Helps you get the results for which you are accountable.</td>
</tr>
</tbody>
</table>
Now go back to page 7 in the guide to the section where you listed concerns and issues that you might have as a new supervisor or when thinking about your upcoming promotion. In the right-hand column on that page, jot down some ideas that you gained from watching the video that might help you address the concerns or issues.

Move to Step 4.
Step 4: Strategy #1 – Accept Your New Role

In Step 4, you will explore ways to increase your understanding of Strategy #1 (Accept Your New Role) and will apply the actions suggested for this strategy to your job or upcoming promotion.

The first thing you need to do as a new supervisor is acknowledge the fact that your accountabilities and your work relationships have changed because of your promotion. You’re no longer “one of the guys/gals”—you’re one of “them”: you’re “management.”

In the past, companies thought it was important for supervisors to know every aspect of the work that he/she managed. That was usually the reason that an employee was promoted to supervisor in the first place—he/she had excellent technical or functional knowledge.

Today, that has changed. A supervisor now must provide more than excellent technical knowledge; he/she must also provide leadership that goes beyond job knowledge. As we indicated earlier in the guide, a supervisor’s role is to help others be successful. That’s what you’re getting paid to do. And you’re in a unique position to do that because you’re closest to the frontline people who are involved with delivering a product or service to the client. So it’s imperative for you to accept your role and take actions to affect what is delivered to the client.

When you help others be successful, what is the impact on the organization? Write your answers below, then compare your thoughts with the suggested answers on the next page.
Possible answers to previous question:
- We create value for the organization.
- We can meet or exceed customer expectations.
- We help meet company goals.
- Employee turnover is reduced/retention is increased.
- Employee morale is better.
- There are fewer mistakes.
- Less work has to be redone.
- Quality is improved.

Many aspects of your job change when you take on the role of supervisor: duties (new or additional tasks), relationships (with employees, manager, and others), and accountabilities (what you're responsible for). Write down some notes in the appropriate space below about what has changed in your role as supervisor and how you can learn what is expected of you. Then compare your thoughts with the suggested answers following the chart.

<table>
<thead>
<tr>
<th>What’s Different?</th>
<th>Specifically What Has Changed?</th>
<th>How Can I Learn What’s Expected of Me Now?</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Duties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Relationships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Accountabilities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Possible answers to previous question:

<table>
<thead>
<tr>
<th>What’s Different?</th>
<th>Specifically What Has Changed?</th>
<th>How Can I Learn What’s Expected of Me Now?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Duties</strong></td>
<td>• Hiring • Firing • Disciplining • Coaching • Setting performance objectives • Performance reviews</td>
<td>• Have one-on-one meetings with my manager • Talk to other supervisors • Find a mentor • Read policy manuals • Attend supervisory training</td>
</tr>
<tr>
<td><strong>New Relationships</strong></td>
<td>• Managing direct reports who used to be peers • Working with fellow supervisors on the team • Coordinating with supervisors/team leads in other departments • My own manager • My manager’s manager</td>
<td>• Ask my manager • Take people to lunch • Learn the organizational chart • Find out how decisions are made at work • Talk with someone in HR • Find out how processes between departments work</td>
</tr>
<tr>
<td><strong>New Accountabilities</strong></td>
<td>• Developing and managing a budget • Tracking overhead expenses • Managing the performance/results of an entire group • Maintaining a safe workplace • Managing facilities • Dealing with compliance issues and legal issues • Maintaining the confidentiality of competitive information</td>
<td>• Ask my manager • Study budget processes • Learn to read reports • Meet with safety and facilities managers • Meet with the HR representative • Meet with people in Finance • Read compliance and ethics policies • Know codes of conduct and ethics</td>
</tr>
</tbody>
</table>
Now, play the video and review the vignette in which Shelby as a new teller supervisor is having a meeting with her bank staff. Pay attention to what she says or does that indicates she’s accepted her new role. Stop the video when you see the fuel sign.

Answer the following questions, then compare your responses with the suggested answers on the next page.

- What actions does Shelby take to indicate that she has accepted her new role as supervisor? Specifically what does she say or do?

- What else could a new supervisor do to indicate that he/she has accepted the new role?
Possible answers to previous questions:

- Treat people with respect.
- Admit what you don’t know.
- Provide ideas, resources, assistance, and encouragement.
- Thank people.
- Acknowledge good performance.
- Provide direction.
- Don’t act “superior.”
- Continue to be yourself.
- Don’t back down from your duties, no matter what challenges you may face.

Move to Step 5.
Step 5: Strategy #2 – Set Clear Boundaries

In Step 5, you will explore ways to increase your understanding of Strategy #2 (Set Clear Boundaries) and apply the actions suggested for this strategy to your job or upcoming promotion.

Some of the challenges in your new role may come from former peers who are “testing the waters” with you. Your new role means an adjustment for them too, so they need to know what the new “rules” are going to be as they begin to relate to you in your new role. Your employees know you only in the role of peer; now they need to know what it’s going to be like working with you in the role of the boss. They want to know what they can and can’t do and what you will and won’t share with them. So you’ll need to start to define your new relationship by setting clear boundaries early on that let your employees know what’s non-negotiable when you’re working together.

- In what ways might you be “tested” as a new supervisor? Write your answers below and compare your answers to the responses on the next page.

- Why will some of your former peers test you in these ways? Write your answers below and compare your answers to the responses on the next page.
Possible answers to previous questions:

- Ways in which I might be tested: I might get pressure to share confidences, divulge confidential information, do special favors, bend or not enforce certain rules, play favorites, look the other way, etc.
- Why I might be tested: Employees are trying to figure out what I will and won’t do anymore; how far they can push me; what the limits are; what the new boss-employee relationship is going to be like; if I’m really competent to do the job; etc.

Continue on next page.
There are actually two types of boundaries that you'll need to set with employees. The first type is boundaries reflecting adherence to the company’s policies or procedures. The second type is boundaries reflecting behaviors that the company sees as appropriate or correct on the job and/or that you see as critical for your team to follow.

Write down some specific examples of the two types of boundaries found in your organization that you will need to deal with as a new supervisor. Then, compare your responses with the suggested answers on the next page.

<table>
<thead>
<tr>
<th>TWO TYPES OF BOUNDARIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies and Procedures</td>
</tr>
<tr>
<td>Behaviors and Actions</td>
</tr>
</tbody>
</table>
Possible answers to previous question:
- Policies and procedures: safety guidelines; HIPAA; grievance policies; compliance policies; codes of ethics; FMLA guidelines; disciplinary actions; etc.
- Behaviors and actions: punctuality and attendance; appropriate interpersonal relationships; service standards; dress codes; honesty; dealing with conflict; use of language/expressions/jargon; etc.

If you do not know some of these boundaries, how can you find out what you should and should not do as a supervisor? Write your answer below.

Depending on your organization’s structure and procedures, you may find answers by asking your manager, other supervisors, the HR representative, the Compliance Office, etc. You may also locate copies of policy manuals and get familiar with the contents or attend additional training.

In the appropriate space below, write down some ideas about actions that you can take to set clear boundaries with employees and why the actions are important.

<table>
<thead>
<tr>
<th>Action to Set Clear Boundaries</th>
<th>Why It’s Important</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Now, play the video and stop the tape when you see the guest check. Watch the vignette in which Rory is in a meeting where she needs to set boundaries. Look for ways that she takes the actions you listed above and for any additional ideas about this strategy. Add the additional ideas to your list above, then compare your responses with the suggested answers below.

Possible answers:
- Stand your ground (because it clarifies your role as a representative of the company).
- Interpret company policies for employees (because they need to know how the boundaries apply to the work they do).
- Don’t reveal confidential information (because you could undermine company strategy).
- Don’t let your personal feelings sidetrack you from enforcing rules (because you have to put business before buddies).
- Don’t worry about not being liked (because it’s your job to follow company guidelines).
- Apply the rules to all employees (because it shows you’re being fair).
- Be direct (because it shows you’re serious about employees’ need to work within the rules/boundaries).

Read the case study below. Assuming the supervisor in the case study is you, determine what actions you should take to set boundaries with Allison, based on what you’ve learned so far. Then, compare your responses to the suggested answers on the next page.

You’ve noticed three times in the past two weeks that Allison has left work for the day, but her laptop computer is still sitting out in the open in her cubicle. Company policy states that employees must disconnect and lock up their laptops at night when they leave or take the laptops home with them to reduce the possibility of theft. When you bring the situation to Allison’s attention, Allison says defensively, “I was in a hurry those nights! I was late to pick Jason up from day care. Besides, didn’t you ever forget to put your computer away? I remember you being in a big hurry to leave some nights—even a few minutes early on occasion! What’s the big deal? You’re not going to write me up, are you? C’mon—I thought we were friends.”
Possible answers to case study on previous page:
- I would remind her of company policy.
- I wouldn’t let my friendship or our past relationship distract me from enforcing company policy.
- I would stay focused on the issue.
- I would help her understand the reason that what she’s doing is a problem.

Move to Step 6.
Step 6: Strategy #3 – Communicate

In Step 6, you will explore ways to increase your understanding of Strategy #3 (Communicate) and apply the actions suggested for this strategy to your job or upcoming promotion.

Communication is a vital aspect of your role as supervisor. In fact, your employees’ success and, ultimately, the company's success can depend greatly on the effectiveness of a supervisor’s communication skills.

- When do you need to communicate in your new role? Write your answers below and compare them to the possible responses on the next page.

- Why is it important for a supervisor to be a good communicator? Write your answers below and compare them to the possible responses on the next page.
Possible answers to previous questions:
- When to communicate: during staff meetings and one-on-one meetings; when setting expectations; to let people know of changes; during coaching sessions; keeping my boss informed; etc.
- Why important: so employees have clear direction and know your expectations; so there’s no duplication of effort; so everyone has the information they need to do a good job; so everyone gets the same information; to reduce confusion and errors; etc.
Communication is actually a two-part process. The first part is the message you send to others, which you can think of as “communication out.” The second part is the message others try to send to you, which you can think of as “communication in.”

Think of someone whom you’d consider an effective communicator. Write down in the appropriate space below what that person did/still does that causes you to consider him/her an effective communicator when both sending and receiving messages. Then, compare your responses to the suggested answers on the next page.

<table>
<thead>
<tr>
<th>Effective Communication Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Communication Out”</td>
</tr>
<tr>
<td>(sending the message)</td>
</tr>
<tr>
<td>“Communication In”</td>
</tr>
<tr>
<td>(receiving the message)</td>
</tr>
</tbody>
</table>
Possible answers:

<table>
<thead>
<tr>
<th>Effective Communication Practices</th>
<th>“Communication Out”</th>
<th>“Communication In”</th>
</tr>
</thead>
<tbody>
<tr>
<td>(sending the message)</td>
<td></td>
<td>(receiving the message)</td>
</tr>
<tr>
<td>• The message is clear.</td>
<td>• The person listens actively.</td>
<td></td>
</tr>
<tr>
<td>• I can understand the message.</td>
<td>• The person asks questions to clarify what I am saying.</td>
<td></td>
</tr>
<tr>
<td>• The person uses words I know.</td>
<td>• The person tries to understand my message.</td>
<td></td>
</tr>
<tr>
<td>• The person doesn't put others down.</td>
<td>• The person pays attention to me.</td>
<td></td>
</tr>
<tr>
<td>• The person uses an appropriate tone of voice.</td>
<td>• The person paraphrases what I am saying.</td>
<td></td>
</tr>
<tr>
<td>• The person’s body language matches the message.</td>
<td>• The person’s non-verbals tell me he/she is engaged with what I was saying.</td>
<td></td>
</tr>
<tr>
<td>• The person asks for feedback.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The communication appeals to things that are important to me.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Now, play the video and watch the vignette in which Monte communicates with Peter. Stop the tape when you see the blue directional sign. While you watch, look for ways that Monte takes the actions you listed above and for any additional ideas about this strategy. Add the additional ideas to your list above, then compare your responses with the suggested answers on the next page.
Possible answers:

- He listened to Peter.
- He stayed focused on his message.
- He appealed to what was important to Peter.
- He sought solutions.
- He didn’t allow himself to be sidetracked.
- He asked for commitment.
- He used appropriate non-verbals.
- He gathered facts.
- He asked open-ended questions.

An important lesson for new supervisors to learn in communicating effectively is that “one size does not fit all.” When you’re “communicating out,” you need to modify or vary your own communication style and approach depending on the preferences of the person you’re communicating with, so the person will hear you and you can get the outcomes you want from your message. In other words, what you say is not as important as how you say it.

Our communication styles and preferences are based on two factors:

1) Our preference for directness in communication: Some of us prefer using very straightforward words and a quick pace, while others prefer less assertive words and a more casual pace.

2) Our preference for revealing emotion or feelings in communication: Some of us prefer not to show them, while others prefer to let them be known.

Put together, the two factors form a matrix of communication styles that helps us know how to modify our approach based on someone’s communication style preferences, which we can learn by listening and paying attention over time to how that person communicates.

Review the graphic on the next page for information about communication preferences and some ways that you can modify your communication style depending on another person’s communication preferences.
<table>
<thead>
<tr>
<th>Style A</th>
<th>Style B</th>
<th>Style C</th>
<th>Style D</th>
</tr>
</thead>
</table>
| Provide specifics  
Be organized  
Stay on target  
Allow for discussion of details  
Don’t hurry the conversation | Focus on results  
Provide options  
Be concise  
Get to the point  
Keep to the agenda | Spend time informally  
Provide time for questions and feedback  
Don’t push or rush  
Show personal interest  
Support people and teamwork | Ask for their opinions and ideas  
Piggyback on their ideas  
Compliment them  
Emphasize excitement  
Be open to socializing |
Read the case study below. Assuming that the supervisor in the case study is you, determine what you would say to someone based on their communication style preference to persuade the person to volunteer for the assignment. Write your answers in the appropriate space below. Then, compare your responses to the suggested answers on the next page.

Your company is about to launch a new product. Based on recommendations from the Marketing Department, your company’s leadership team decided that one of the best ways to get the word out about the new product would be to contact existing customers directly by telephone to let them know about the product. Supervisors were asked to identify and approach employees who would be good at customer relations to volunteer to take on the extra assignment, which would involve a total of five hours overtime during a two-week period, starting in 30 days.

- What would you say to someone with communication style A?

- What would you say to someone with communication style B?

- What would you say to someone with communication style C?

- What would you say to someone with communication style D?
Possible answers to case study questions:

- Approach for communication style A: take time to include the details of the situation; appeal to the person’s ability to work on the project in a systematic and organized way; ask for his/her thoughts on how best to approach the project; etc.

- Approach for communication style B: get right to the point of what you need; emphasize the person’s ability to help the group get the project done within the short time frame; bring up the person’s ability to focus on task accomplishment; talk about options for accomplishing the task; etc.

- Approach for communication style C: open with casual conversation; tell the person how critical teamwork is to the success of the project and how he/she can play a key role in keeping spirits high during the project, especially during the evening hours when people are tired; emphasize the need for cooperative relationships in successfully accomplishing the task; etc.

- Approach for communication style D: open with casual conversation about what he/she might have already heard about the product launch; ask for his/her opinion about the product launch; emphasize the need for fresh approaches when talking to existing clients about the new product and his/her ability to think in creative ways; emphasize how visible the project is to management; etc.
Now you can identify ways in which you can apply the information about communication style preferences to people you work with. In the appropriate space below:

- List the names of people who report to you or that you work with. Include your manager in this list.
- Determine what you think each person’s preferred communication style is and why.
- Identify several actions you could take to communicate with that person more effectively, based on the person’s style preference.

<table>
<thead>
<tr>
<th>Name</th>
<th>Style Identification</th>
<th>Actions to Increase Communications Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preferred style:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Why:</td>
<td></td>
</tr>
</tbody>
</table>
Another important aspect of communication is receiving a message from someone else, or "communication in," which involves effective listening. Effective listening, also known as active listening, requires us to apply ourselves to what we hear in four ways:

1) Showing respect for the speaker
2) Giving attention to the speaker
3) Using appropriate body language
4) Interacting with the speaker

Identify some actions you can take to demonstrate each aspect of active listening and write your answers in the spaces indicated below. Then, compare your answers with the suggested answers on the next page:

<table>
<thead>
<tr>
<th>Respect</th>
<th>Attention</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Body Language</th>
<th>Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Possible answers to previous page:

- Respect: put aside any negative attitudes or feelings toward the person; consider each suggestion or complaint with an open mind; show objectivity; keep an impartial attitude; etc.

- Attention: stop what you’re doing; give the person time; if you can’t stop, ask the person to return at a more convenient time and schedule it; don’t let others interrupt the conversation; stay focused; don’t get distracted; etc.

- Body language: project such positive signals as eye contact, facing the speaker, nodding, leaning toward the speaker; avoid sighing and rolling your eyes; etc.

- Interaction: paraphrase; say “uh-huh,” “hmmm,” “I see”; ask questions to clarify; repeat/rephrase what you heard to verify your understanding; take notes; ask questions to get additional information; etc.
Identify four people with whom you’d like to improve your listening when communicating with them at work (e.g., boss, direct reports, clients, and/or peers) and write their names in the appropriate spaces. Then identify specific actions you can take to listen more effectively to each of them and when you can take the actions (e.g., in staff meetings, during one-on-one coaching sessions, during project meetings, etc.).

<table>
<thead>
<tr>
<th>Name</th>
<th>Actions I Can Take to Improve Listening</th>
<th>When I Will Take the Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Move to Step 7.
Step 7: Strategy #4 – Take Action

In Step 7, you will explore ways to increase your understanding of Strategy #4 (Take Action) and apply the actions suggested for this strategy to your job or upcoming promotion.

Another important aspect of your new role is getting results. This requires you to take action, even if the path forward seems unclear, the direction you’ve been given is ambiguous, you don’t have all the information you need, or you have a lot on your plate already.

The first step in taking action is just to focus. You need to sift through the issues or information and figure out just what type of action the situation requires you to take. The type of action you need to take is usually one or a combination of these three:

- Solve a problem (find the root cause of the problem)
- Execute something (create a plan and a schedule)
- Decide (generate alternatives and choose one)

Now, play the video until you see the green mileage sign and watch the vignette showing Schultzie with his team. Look for the type of action he decided to take (solve, execute, or decide), why he took that action, and how. Answer the following questions, then compare your responses with the suggested answers on the next page.

- What was the situation Schultzie was facing?
- What was the action that Schultzie needed to take?
- What did he do effectively to take action?
- What else could a supervisor do to take action to get results?
Possible answers:

- Situation: a new project needed to be started right away; it was a high priority.
- Type of action: create a plan so they could get started.
- Schultz's actions: he analyzed the situation; he admitted past mistakes and their impact; he used clear communication; he listened; he suggested a process for moving forward; he established priorities and a timeline.
- Other actions: get the facts; involve others; investigate; organize; anticipate obstacles; enable others to act; don't procrastinate; take risks; avoid paralysis by analysis; stay flexible; be persistent; generate alternatives to choose among.
Read the case study below. Assuming that the supervisor in the case study is you, think about how you might answer the questions that follow the case study. Write your answers in the appropriate space below. Then, compare your responses to the suggested answers below.

You’re a newly promoted supervisor in one of the testing labs in a large regional hospital. It didn’t take long before you started to feel overwhelmed by all you have to do: the paperwork, scheduling three shifts of employees, trying to hire a new lab technician, dealing with a couple employee relations problems, and enforcing a new dress code that none of your employees likes. It seems as if you just don’t have enough hours in the day to get everything done. Then, just yesterday, you heard from your manager that the budget was finally approved to buy a new piece of testing equipment for your lab, and she asked you to investigate which model would be the best to buy and make a recommendation to her in a week. But you don’t have a clue about where to start, and you’ve already lost one day.

• How can you deal with all your regular job duties so that you feel more in control and less overwhelmed?

• What type of action is required of you to make the equipment recommendation to your manager?

• What’s involved with taking that action?

• What options do you have for getting this done?

• Why could it be easy to fall into the trap of thinking “I’ll just do this myself” when you’re faced with a task?

• Why isn’t it a smart move to do everything yourself?

• If you involve others in this task, how can you increase your comfort level that the task will be accomplished?
Possible answers:
- Dealing with regular job duties: I can prioritize, organize, and plan.
- Type of action: to decide–make a choice.
- What’s involved: do research; generate alternatives/choices; make a final decision about what to recommend.
- Options: I can do it alone/all myself; I could delegate some or all of it; I could get others involved to help me.
- The “trap”: I know the job; I don’t trust others to do it as well as I could; I’m more comfortable as a “worker bee” than a supervisor; I want to control the situation.
- Not a smart move: I risk not getting everything done or done correctly; I’m not developing others; I’m sending a message that I don’t trust my employees.
- Increasing comfort level: I can set parameters; I can put milestones and checkpoints in place; I can establish a timeframe.

**Move to Step 8.**
Step 8: Focus on the Future

The more immediately you use the skills you learned through this Guide, the more effective you will be in your new role as supervisor. Your commitment to use the skills back on the job begins with a plan.

But, do not overwhelm yourself by trying to focus on everything at once. Instead, begin your improvement plan with strategies you believe are priorities—strategies and actions that you consider most important and urgent.

Directions:

- Review the four strategies and the notes you took about specific actions to implement each strategy.
- For each strategy below, identify specific ways that you can implement the strategy back on the job and plan how to implement your ideas by responding to the planning questions for each strategy below.

<table>
<thead>
<tr>
<th>Strategy #1: Accept your new role</th>
<th>What will I do to implement the strategy?</th>
<th>When will I do it? With whom?</th>
<th>How will this action help me be successful in my new role?</th>
<th>How will I measure the success of this action?</th>
<th>What do I need from my manager? (ex. answers, support, resources)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategy #2: Set clear boundaries</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What will I do to implement the strategy?</td>
<td>When will I do it?</td>
<td>With whom?</td>
<td>How will this action help me be successful in my new role?</td>
<td>How will I measure the success of this action?</td>
<td>What do I need from my manager? (ex. answers, support, resources)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategy #3: Communicate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What will I do to implement the strategy?</td>
<td>When will I do it?</td>
<td>With whom?</td>
<td>How will this action help me be successful in my new role?</td>
<td>How will I measure the success of this action?</td>
<td>What do I need from my manager? (ex. answers, support, resources)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Strategy #4: Take action

<table>
<thead>
<tr>
<th>What will I do to implement the strategy?</th>
<th>When will I do it? With whom?</th>
<th>How will this action help me be successful in my new role?</th>
<th>How will I measure the success of this action?</th>
<th>What do I need from my manager? (ex. answers, support, resources)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Move to Step 9.
Step 9: Post-Guide Assessment

In Step 1, you completed a Pre-Guide Assessment of what you believed your supervisory skills were prior to completing this Self-Study Guide.

Now it’s time to complete the Post-Guide Assessment on the following page. You can then compare your Pre- and Post-Assessments to learn if you have improved your knowledge and skills about the new role of supervisor.
Post-Guide Assessment

Prior to the course, you completed a Pre-Course Assessment. As you did then, circle the number that reflects the level of your knowledge and/or skills regarding the role of supervisor now that you have completed the course. Then compare your answers with your answers on your Pre-Course Assessment. Hopefully, you will not believe that your knowledge and/or skills have diminished!

- *I am able to explain the purpose of the role of supervisor.*
  
  High 4 3 2 1 Low

- *I can distinguish specific ways in which the role of supervisor is different from the role of a non-manager employee.*
  
  High 4 3 2 1 Low

- *I recognize all the changes in my duties, relationships, and accountabilities in my new role as supervisor.*
  
  High 4 3 2 1 Low

- *I am able to define clearly my new working relationship with my employees.*
  
  High 4 3 2 1 Low

- *I can describe the appropriate communication techniques to send and receive messages effectively.*
  
  High 4 3 2 1 Low

- *I can identify the right steps I must follow to get the results I need.*
  
  High 4 3 2 1 Low

Move to Step 10.
Step 10: Summary

You've worked hard to complete this Self-Study Guide. You're now ready to put into practice what you've learned.

In conclusion, here are a few words of summary and encouragement:

• None of us will ever learn everything we need to know, so we should always be working on improving our skills.

• Navigating the changing role from peer to boss will go more smoothly and successfully if we use the strategies in the Guide.

• The four strategies include accepting your new role, setting boundaries with employees, communicating effectively, and taking action to get results.

• Your action plans will work if you devote time and energy to it!

Move to Step 11.
**Step 11: Self-Study Guide Evaluation**

Please complete an evaluation of the Self-Study Guide and give it to the person in your organization who is in contact with representatives of VisionPoint.

VisionPoint is always eager to learn how to improve its programs. Your evaluation, therefore, will be appreciated and valued.

The evaluation is on the following page.

Thank you!
Self-Study Guide Evaluation
Peer Today, Boss Tomorrow
Please circle the number that best describes your evaluation of the Guide.

The Self-Study Guide has given me a working knowledge of the strategies successful supervisors have used to make the transition from peer to boss.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

The Self-Study Guide has improved my supervisory skills.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

As a result of the Guide, I am more confident in my abilities to effectively apply supervisory strategies in workplace situations.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

The desired learning outcomes of the Guide were clearly presented and achieved.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Discussions, exercises, practices, and action-planning were valuable and sufficient.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

The Self-Study Guide was well organized.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

The best part of the Guide was:

This Guide could be improved by:

Additional comments:

I would recommend the Self-Study Guide to others: (circle one) Yes No