

Are you Leading or Managing?

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CCH Learning:

Hi everyone, and welcome to today's webinar regarding Are You Leading or Managing? I'm Alison Wood from Wolters Kluwer with CCH Learning and I'll be your moderator for today.

Just a few quick pointers before we get started, I'd like to let you all know if you're looking for your PowerPoint, it's saved in the handout section of the GoToWebinar panel. Any sound problems you can toggle between audio and phone. And shortly after the session today, we'll send you an email letting you know that e-learning recording is ready to be viewed. Any questions today, you can type those into the questions box. I will collate those questions and ask them at the Q&A at the end of today's presentation.

CCH Learning also offers a subscription service, which many people have termed Netflix for professionals. It provides members with access to our entire library of recordings as well as live webinars, for a very competitive flat fee. That's for over 500 hours of content. And for CPD purposes, your viewing is logged automatically.

Your presenter today is Deborah Assheton, who is the owner and director of The Amplify Group, a business that uses best practice frameworks to deliver very practical, high impact leadership, change, and interpersonal skill building workshops, coaching, and leadership programs. Deb's passion is to help professionals deepen their self-awareness and embed behavior that creates new levels of performance, engagement, and results for them. Deb offers executive coaching, leadership development programs, short and public workshops.

Deb has over 20 years experience in the executive leadership positions where she's managed some very large teams of more than 3000 people for some of Australia's best known and highly regarded companies, including Vodafone, Bupa, and OPSM. Deb holds a BA in psychology and a master's of organizational coaching for Sydney University.

Deb's clients span the retail and wholesale sectors, property management, banking, legal, technology, transport and motor, and telecommunications industries. So without any further ado, I'll now pass you over to Deb to commence today's presentation.

Deb Assheton:

Thank you very much, Alison. I'm just going to sort out my screen and make sure we get the right one, just confirming with you that you've got the right screen there, Alison, that you can see in my screen.

CCH Learning:

Looks good. Thanks Deb.

Deb Assheton:

Awesome. So I'm very excited to be talking to you about this big topic about what's the difference between leading and managing, and are you leading, or managing, or doing a combination of both today? Now it's a very big topic to cover in 60 minutes, so I'm going to move pretty quickly. I'm also going to touch on some foundational aspects of leading and managing.

But where I want to start though is kind of at the bigger picture of each of them as domains and then I'll work into ever-increasing levels of detail as we go through the workshop.

So we're going to cover quite a lot of ground, and we'll look at the bigger picture domain question around leading and managing. Then we'll get into some skills and then also the execution of both. So there is an execution element to leadership, just as there is an execution element to managing. And of course we'll have a couple of minutes at the end of the workshop for Q&A, and we've got some polls as we go.

So let's get into it and have a look at this topic. And what I wanted to do was start with the poll today. So the poll question is, how do you know that a leader is in the room? So let's imagine that you are in an in-person meeting. There's eight or 10 of you in the room. And there's somebody in the room who you think, "Wow, that person's a leader." What is it that they say or do that tells you that they're a leader? What is it that makes you think, "There's a leader in the room." What is it about the way they behave, the way that they are present, that identifies them as a leader to you? So you can answer in the question box, which is shown here, and I can see some answers coming up here. I'm just going to scroll through them.

So a couple of responses. People defer to them. People are better behaved when there's a leader in the room. So people focus their attention on a leader. Leaders ask questions and bring together different points of view. Leaders set direction and let everybody know where they're going.

Yeah. So I've been asking this question for a long time in the workshops that I run with clients. And invariably when I ask the question, "How do you know that a leader is in the room and how do you know that a manager is in the room?" You get very, very different responses.

So your responses are right on par with what everybody says about a leader. There's something about their presence, that means that people pay attention to them. No one has ever said to me they're the most senior person in the room, they're the highest paid, they're the expert, they're the oldest, or they've been there the longest. That's not what makes somebody a leader.

Equally, when I ask about how do you know that a manager, a really effective manager is in the room, people say, "Well, they're the organized one. They're the one asking questions about how we're going to do things. They're the one raising challenges. They're the one thinking through the steps. They're the one starting the collaboration and integration process so that we all work together really well."

Again, nobody's ever said they're the most experienced or the expert in the room. Nobody's ever said they're the highest paid, or the oldest, or the youngest, or the most senior person in the room.

So we identify leaders and managers not based on experience, or age, or seniority, or pay, or expertise, but on behaviors. And the good news is that most of the behaviors, particularly around management, can be learned and learned pretty quickly.

Leadership takes longer, I think, to learn. But again, a lot of what we're talking about is learnable. And I want to talk to you about the difference between these two domains today.

So let's have a look at this at the highest level. So if we're just talking at a very macro level about each of these domains, leadership is about setting direction. It is about saying to people and then helping them to understand, which we'll talk about in a moment. This is where we're headed and why. We are going in this direction for these reasons, or we are focusing on this direction for these reasons. So leadership is about setting direction. It's about setting the needle on the compass and establishing what north looks like, so to speak.

Management is about mobilizing resources to get there. So management is about saying, "What are all the resources we have to head in that direction?" And by resources, we can mean money, we can mean people and their skills. Obviously, the human skills that they bring. We can talk about products and services as being resources. Customers can be resources, as well as being beloved customers. So it's about mobilizing the resources we have in that direction, in the direction aligned with the north. So leadership is about setting direction and management is about mobilizing the resources to get there.

So a leader is thinking about, where are we headed, what's the context for that? I'm going to talk more about this in a moment. So leader is thinking about those questions, and a manager is thinking about, what does this look like on Tuesday morning at 10:00 AM? How do we schedule this? How do we make that work? How do we get to north, given the hurdles and the challenges that we have? And neither one is easy to do, and of course neither one alone is enough. So let me talk a little bit about that now.

The reality is, and research shows that organizations need a combination of both leadership and management. There's a bit of a urban myth floating around about the sole senior visionary leader who somehow magically manifests products and services all on their own.

And that's actually not the case. For every visionary leader you see, there is a team who is executing that vision to greater or lesser degrees of effectiveness, obviously.

So leadership and management are actually two distinct domains of perspective, skill, and focus. They are complimentary of course. And they're complimentary in terms of their perspective, skill sets, and focus. And in the world of corporate and professional services organizations, we need this combination of both to achieve anything of substance. We can't just have a visionary leader. It's like having an upper torso and a head with no legs. And equally, we can't just have the legs without the vision and the eyes. So we need the manager as the legs and the eyes, and the vision comes from the leader.

So both are necessary in the right balance just for achieving anything of substance, but also for effective change. So without the leadership, we go in circles. We just run around with no north. Without the management, we just talk, talk, talk, talk, and nothing happens.

And Stephen Covey in his book, the 7 Habits of Highly Effective People, he has this great sort of story that he uses around the difference between leadership and management. So he says, "Imagine you're in a jungle and your goal is to get to the other side of the jungle. And the manager's role is to make a path. It's to be out there with the machete, cutting through scrub, getting around big trees, working out where to camp for the night, helping people who've got mozzie bites or injuries, figuring out which scrub is possible and which isn't." So the manager's there kind of cutting their way through.

The leader should be the one who's all the way up the tallest tree, who points out and looks out over the jungle and comes back down and says, "Actually, we're in the wrong jungle." So the leader is the one that takes this high level perspective and the manager is the one who makes the vision a reality.

Now, when we talk about the leader's the one and the manager's the one, it can actually be one person, of course. You can have a vision and then you can have the management skills to progressively make that vision a reality. So let's have a look at what that means in practice.

So when we talk about setting direction, that includes things like creating and sharing vision. So creating a vision in our mind and then sharing it, talking about it, bringing it to life for people, illustrating it. It involves resolving conflicts that come up along the way. Every vision contains some kind of conflict, some kind of tension.

The leader is the one who inspires and expands, so inspires us to think about how this will feel when it's done, or how we're going to overcome the challenges together, and expands us in saying we can do it. We can find a way. We can think differently. We've got a lot of breadth here. They generate shared understanding and ownership.

So part of sharing the vision is A, it helps the leader clarify it for themselves, and it strengthens the vision to have people ask questions about it and talk about it. But it also creates the shared understanding. And shared understanding is essential for any kind of ownership over the long term.

If you want me to chase this vision, I have to understand the vision. I have to understand why it's important. I have to feel that. In order for me to go through the pain of whatever the challenge is at 10:00 on a Tuesday morning, in order to get there.

So also, leaders raise their expectations of what's possible. They articulate and make explicit what could be possible, and they raise what good looks like to achieving what's possible, rather than just showing up for work.

And so there's an element of challenge in leadership where we are challenging people to think differently, to be different, to do things differently. And that's challenging us, I, we, you. So it's not just the leader challenging you, it's the leader challenging the collective, including themselves.

When we talk about mobilizing resources, we're talking about quite different things. So the manager is the person who says, "Okay, that's the direction we're going in. How do we plan and execute that? How do we break that into chunks? How do we allocate resources when there are never enough resources?" So there's either not enough time, or there's not enough people, there's not enough money. Or there is money, but it's coming later. And so what can we do now with our people until that money comes?

So it's that kind of problem solving and hurdle leaping that that managers do. Creating and assigning tasks, reassigning tasks, overcoming problems, plotting steps, course correct, measuring progress, counts and monitors. And also, iterate some response.

So there are different elements to both. And obviously, unless we've got somebody setting direction, we don't really know where we're headed. And unless we've got somebody executing the delivery of that step by step, managing the process of getting there, then even if we do know where we're headed, we're not likely to get there. And whilst it's very easy to explain on paper, in reality, both are hard to do, especially now.

So right now... And anyone who's worked with me before will probably have seen some of this work, but right now the global environment is what is being called VUCA. And VUCA stands for volatile, uncertain, complex, and ambiguous. So these are the times that we are living and leading in, and there's certainly the times that we are managing in. And the VUCA environment is characterized by these things, and none of them are stable, or clear, or linear, or traditional.

And so part of our journey is about navigating our instability and in all these forms. And so VUCA is changing the nature of the challenges we face. It's changing the nature of mistakes that we make, and it requires us to be constantly adapting, readapting, adapting. So there's this constant movement.

And I'm going to talk about a few aspects of this, because it's important for both leaders and managers to be operating on this understanding, that even though you set the North Star as being over there in three years time, that actually the nature of VUCA means that we know that the moment you've set that goal, you're still going to have to find a way how to get there. You can plan it out all you like, but reality's going to interrupt those very well-formed plans. And we are looking at how we find a way, because challenges come up along the path that some are foreseen and others are unforeseen.

So I want to talk about the types of challenges that we're facing, because unless we have this foundational understanding that our job is not to follow a set of plans religiously so to speak, not to follow a set of plans to a fault. Our job is actually to find a way for both leaders and managers.

So leaders are looking at, what are the adaptive challenges? What are the big picture things we need to be thinking about in order to find a way? And managers are daily, finding a way, through the allocation of resources, and the mobilization of resources, and moving stuff here to there. They're finding a way on a more micro level at 10:00 on a Tuesday morning. So in actual fact, through different domains, both leaders and managers are always leading the process or managing the process of finding a way.

Now, I deliberately use the term finding a way because it doesn't matter what industry you are in, and it doesn't really matter what product and services you have. In the current environment, if you have a team that can find a way to your goals, then you're set.

And so enabling teams to find a way is a really important aspect of both leadership and management right now, because there is no one path to achieving our strategic goals anymore. Because we are living in volatile, uncertain, complex, and ambiguous times. So I'm going to talk a little bit more about this as we go.

So let's have a look at leadership first. And I'm going to look at a couple of models and a couple of aspects of leadership that I think are really important as part of understanding the difference between leadership and management.

So there's a couple of really important jobs for leaders right now. Number one is to seek opportunities for sustainable revenue growth. Revenue growth is the pinnacle right now for businesses. Particularly in established industries, it's hard to achieve sustainable revenue growth. And of course, we're looking at every possible angle to do that. So this remains a challenge for leaders.

It is also to identify and lead your organization or team through adaptive challenges. So I'm going to talk more about those in a moment. It is to engage your team and customers, and this is the work of leaders in terms of engaging your team and customers, and where you're growing as an organization, and how you're growing, and how that benefits them. And of course, it's to demonstrate passion.

And the kind of attributes that people identify as leadership attributes, so things like commitment, openness, decisiveness, empathy, and confidence. And these things have not changed in decades.

So what's really interesting is the same attributes that would've identified you as a leader 20 years ago exist today, and arguably even two or 3,000 years ago in the world of the stoics, these are the kind of character attributes that were ascribed to leaders back then. So for leaders, there's an aspect here that is about your interpersonal capability and your passion for the cause.

And of course, number five is focus the vision, make it specific and clear. That is easier said than done. It's vital that we have clarity and specificity, because otherwise, it makes it very hard to manage. And it doesn't necessarily compromise finding a way, because what we're not doing is changing the vision every two years. It's not a good idea and it's not leadership.

What we want to do is have clarity on a vision over a couple of years. Not necessarily a 10-year vision anymore, but maybe a three-year vision, or it could be five. And then the finding a way happens in the management space. I'll talk more about that in a moment. So we don't change the vision all the time, because then that makes it really hard to connect with for our people.

So let's have a look at the work for managers right now. So for management, it is about, number one is prioritization. So I work with lots of different clients across many industries. The number one complaint that I hear from employees, number one across the board, and not just in Australia, but effectively around the world, is that there's too much work. And that they find the workload crushing, onslaught, overwhelming, anxiety producing. They're the kinds of words that people use to describe their workload at the moment.

And it's got nothing to do with those people's performance in most cases. It's an issue of prioritization at the leadership level of the business. So when it comes down to managing how we're going to get to where we're going, prioritizing and being ruthless about that is really important so that we don't overburden our team with work. And I'm not talking about them working a couple of extra hours a week. I'm talking about not flooding them with work.

So we want to pace their progress so that we can bank gains. We want to utilize conflict constructively. So this has been a really major shift in organizations over the last 10 years, where previously, it would've been the role of the leader to solve conflict situations, or to bury a conflict, or put it to bed as people used to say. And now, it's more about opening up discussion about moments and areas of tension and conflict, so that we can have a discussion about it and find a way through it. So there's a lot more openness around it.

It requires skills of a manager to figure out how we do that and to lead it constructively. So you might have conflict over resources, for example. And so the role of the manager now is not just to decide but to engage the team in that, because we want a collective firepower here. Instead of one person working on something, we want two or three people, and I'll talk more about that in a moment.

We want to elevate line of sight and clarity always. So line of sight meaning line of sight to North Star. So how does my job and this work that I'm putting in at 10:00 on a Tuesday morning contribute to where we're going in three years time?

What that does is elevate clarity. The more clarity we have helps us to offset volatility, uncertainty, and ambiguity, particularly uncertainty. So they balance each other out.

We want always to create a performance focus, and that performance focus is against the vision. We want to call out problems and challenges. If we're really going for some hard goals and we want to achieve them, then we can have zero avoidance on the path. And avoidance in my experience, is still quite a big issue in many organizations. So we can't afford to have any avoidance about the challenges that we face. Instead, we want to have the skills to face into the challenge and discuss it openly. Not as a group of 300 necessarily, but in small groups, so that we find a way through it. Avoidance just makes that challenge grow silently bigger and bigger and bigger. We want to know how that works.

So we want to be able to utilize diversity of thought. And by diversity of thought we mean different views on how we capitalize on opportunities, solve problems, understand situations, so it's not just one head anymore. Again, I'll talk about that in a moment, and measure and communicate progress. So that's the realm of management right now, some of the priority areas for managers.

So let's have a look at some of the leadership aspects, and then we're going to have a look at some management aspects. And what I want to do is talk to you about how VUCA is changing the nature of our problems. So historically, we've solved what were called technical problems or technical challenges. And this is where a problem was easy to identify. You can read that, solved by the knowledge of experts, and resolution was pretty identifiable.

What we're seeing now are still traditional technical challenges, but we're seeing a lot more of what are called adaptive challenges. And in an adaptive challenge, the problem's hard to define. There's often no one clear solution. It's easy to resist or ignore. See in that avoidance bucket. Has a longer timeframe. And there's no one person who has the answer to adaptive challenges.

So Covid was a good example of an adaptive challenge. Right now, hybrid working is an adaptive challenge, which no one person in any organization has the answer for. We are facing many, many adaptive challenges in organizations, just as we are globally.

So another example of an adaptive challenge that's on our doorstep is AI and its implications for our work, our organization, our team, our brand, everything. And so what we're seeing is more and more adaptive challenges.

Now, adaptive challenges require leadership responses. And if you are somebody who is not leading, but managing all the time, but not taking enough time for leading, then you're at risk of being left behind at some point, because you're not leaning into adaptive challenges. So if you don't get your hybrid working sorted out, you lose people. If you don't prepare for AI, you risk being left behind with whatever happens there.

So as we lead our organization or as we manage our organization, we need to be able to sit with both of these hats on, and develop our capacities in both, or bring in people who help us do that. I want to show you a model, really good little model that shows the difference between the two in action. It's called the balcony and the dance floor. And there's heaps of information on this. You can just Google it. It's from Ronald Heifetz who's a global expert in leadership at Harvard.

And what he talks about is that if you can imagine that all organizations operate in a ballroom. And on the dance floor, is the management, it's the action. It's where all the action happens. It's the 10:00 on the Tuesday morning, it's the putting out fires, it's the solving problems, mobilizing resources, managing problems, getting work done.

And then if you leave the floor and you go up onto the ballroom balcony, this is where you see the dance from an upgraded perspective. So from the balcony, you can see the entire dance floor, and you can see who's waltzing, who's doing the tango, who's dancing on their own over there, who's playing the music? Is anyone serving food? What's going on systemically?

And what he talks about in this model is that we need the capacity to do both. And I've got some questions here that, I'm not going to go through them all now, but I'd really encourage you to reflect on about, where do you sit here? Do you favor being on the dance floor and don't spend enough time on the balcony, or do you spend too much time on the balcony and you're not close enough to the dance floor?

So ideally, what Ronald Heifetz talks about here is you need to be able to move between both seamlessly. And the hallmark of somebody who's really effective is that they can sit in a meeting that is about a dance floor problem and bring the balcony context to it. Or they can sit in a balcony meeting a leadership meeting that's quite strategic, and talk with authority and detail about what that means for the dance floor.

So when we get them both, we have the domains, both domains, leadership and management in our head. We understand the big picture. We know what the North Star looks like, we understand why. And we've got clarity and expertise and depth about what that means for the dance floor. And this is the person who's the leader in the room, incidentally, they can talk about both.

So I'm going to leave you with those questions, and also this slide that just talks about the benefits and risks of both. So the benefits of the balcony are that we get this broader systemic view. And the benefits of the dance

floor are that we get the acting and doing, the management staff. And so we get the perspective, the real perspective. And so there are skills that come with those, but there are also risks.

So if we spend too much time on the balcony, we risk being in that ivory tower space of a leader who's talk, talk, talk, talk, talk, but no depth because they've been out of the action for too long. And therefore, what they're saying becomes irrelevant.

When we're too much on the dance floor, we lose the capacity to respond and initiate, which is the leadership capacity. And instead, we are just on this treadmill of reacting. And the hallmark of somebody who's on the dance floor all the time is that they tend to make the same mistakes.

So part of balancing leadership and management is about making sure that you spend the right amounts of time reflecting on your role from a balcony perspective as well as being in the dance or in the dance floor. So those questions that were on the previous slide should help you to think about that. And of course, that's different for different roles.

But if you are on the dance floor constantly, then part of what we need to do is shift you back into leadership mode. And you need to do that. You need to clear some space for thinking. So let me get in and talk about, what does that actually mean when we talk about leadership mode?

Well, leadership skills are different to management skills. Leadership skills are often associated with two things. One is the ability to set goals and direction. So that's the capacity to zero in on a bigger picture and to understand why. And you have to be decisive about landing on that.

The other aspect of leadership is the capacity to do all the other things we talked about. To share the vision, to clarify the vision, to overcome conflict, to inspire, to expand, to point people in the right direction, to help them see themselves as getting there. And they are emotional attributes.

And we've got a whole range of courses here at CCH, at Wolters Kluwer, that support the development of those courses. And obviously, we can't get into them now. But that emotional intelligence, change capacity, and the capacity for managing conflict are all really important.

So you can look up all of these attributes if you want to do more research on them. The one I'm going to talk about now is the capacity for setting direction and goal orientation, because it's probably a little bit lesser known.

So when we're talking about setting direction and goal orientation, it's not just about saying, "We're going over there, and north is there," and it's so wildly out of the way that people go, we don't want to lose people on the journey. So we need to be able to show people not only what the direction is, but also how to join the dots.

And there's a wonderful construct called goal hierarchies that help us to do that. Now, this is from the work of the Angela Duckworth who wrote a bestselling book called Grit. But you can again, Google goal hierarchies, and there's a whole lot of information on this.

So goal hierarchies are where we show how lower order tasks and small goals contribute to what psychologists call a superordinate goal. Now, the superordinate goal is our wildly important goal, our big, wildly important goal. It is the big, hairy, audacious goal. It is what north looks like.

So when we have a goal hierarchy, we say, "Here is the wildly important goal. And then, here are the major ways that we're going to get there," which is that second level of goal. So we've got three paths that we're taking. And then they break into smaller goals, and then into action or tasks.

And what goal hierarchies do is enable me as a person who's taking out an action at 10:00 on a Tuesday morning, to understand how my action contributes to the superordinate or the wildly important goal.

Now, what actually happens is that the wildly important goal becomes the organizing principle for how we mobilize resources. And so without a goal, this is where people tend to fight over resources, because there's no benchmark to say which one supports the goal more fully, depending on the context. That's the way we're going.

So having the wildly important goal and goal hierarchy structured for people helps us to understand line of sight, clarity. And that invites engagement, inspiration, expansion. And it gets me thinking about me as the person doing the action, how am I going to make sure that this task contributes to that goal?

So let's have a look at this a little differently. This is the world of leadership, the big picture goals. And then the execution of those is the world of management. So what we don't do is change our subordinate or our wildly important goal just because the day-to-day gets too hard. What we do is get better at finding a way day-to-day. So we say, "Okay, well action A didn't work, let's stop it. We try action B." Or we try a combination of action A and B in a new action C. This is iterating, this is business as usual innovation. Not massive innovation, but getting better at finding a way like this. But it's not lost. It is determined zigzagging in order to get to our important goals.

So leaders are setting that context and managers are executing within that context. And in an ideal environment, we are all thinking about, how do we get there? How does what I'm doing help? And I've got another little slide that I want to show you about what this means at a team level.

So historically, goal or typical orientation in teams looks a bit like this. So you've got team member A, B, C, and they report through to the manager, and the manager reports through to their manager. And the KPIs, the goals sit with the manager only. And so you've got the manager thinking about how to get there and then assigning tasks to team member A, B, and C.

But in high performing organizations and high performing teams, the orientation looks different. So you've still got team member A, B, and C, and the leader or the manager. But what happens in high performing teams is that everyone is focused on the goal. And this is also how agile teams are oriented as well.

So what happens is in the space where all the arrows are, there is more discussion about, is this the best way to get to the goal? There's more feedback between team members. There is more diversity of thought. There is more engagement because we've got four heads thinking about how do we achieve this goal, versus just one in the typical team orientation.

So my question for you around leadership is, are your teams set up to achieve important goals? Because this is foundational for us then, in helping us make our management decisions.

So I want to move on now and talk about aspects of management. And management is hard. It's really hard. I think personally, having done a breadth of both roles, I think management is just as hard as leading, different challenges. And management also can be really exhausting, especially in the current environment where things are changing very, very constantly. So there's a couple of things I just want to say on this slide, because I'm not going to go into all of these.

Managing your time and energy are I think absolutely vital, non-negotiable skills and necessities for managers. And I mean here managers of reasonably sized teams. So managers that are managing sizable workloads and outcomes, you have to be able to manage your energy and time, which means you have to be able to manage your calendar. Not just manage it, actually, master that calendar. So you need to be managing your calendar ahead of everybody else who's trying to get into your calendar.

Now, I talked about this quite a bit in last month's workshop, but there is best practice time, energy, and calendar management. And it involves you setting parameters for your working hours, for the best times of day for you to do certain types of work. And it involves you blocking out time in your calendar so that you can be on the balcony and you can be on the dance floor, and not compromising as many managers do, the balcony time. Because there's the latest dance floor issue. So those three things are really important for you to be able to be effective over the long term.

And they allow you to stay in your power. Now, by power, I don't mean power over other people. I don't mean force, I mean power. When you stay in your power, this means that you're bringing your best to your work. So you are feeling constructive, you're feeling in control. Not controlling of other people, but just in control of your own workload. You know your goals, you know where you're going, and you're able to really be clear with people and solve problems as they come up. And you don't fall into anxiety, overwhelm, and fatigue.

When we fall into anxiety, overwhelm, and fatigue, we don't make great decisions. We fall into avoidance, because we don't feel like we can cope. And fatigue is the start. The fatigue zone is the start of the breakdown process.

So I'm not saying if you feel fatigued today, that you're on the verge of a breakdown. There's a long process involved. But what we want to do as managers is to be on the front foot, because we're going to be managing for the long term. And to do it really well, we need to be in our power. Then we need to be able to set expectations, stay communicated, and connecting. We need to manage at the right level, and of course we need to celebrate and learn.

So I want to talk about these two things in the next 10 minutes or so. I want to talk about the importance of setting expectations and then managing at the right level. Of course, there are many, many other aspects to management as well. So let's have a look at these two things, and what we're really talking about here is work management, mobilizing resources, and doing that really effectively.

So the first thing I want to talk about is how setting expectations works and why it's so important. And I'm talking here about setting expectations beyond your KPIs, your key performance indicators, or your KPIs, or whatever you call them in your organization. I'm talking here about setting expectations about how we're going to work together, how we're going to solve problems. What do we do with round the clock emails? What should you do if you come across a mistake? It's that level of setting expectations.

Because here's how it flows in the real world. People come, and they deliver different qualities of work, and different qualities of communication. Some people are clear, some people are not. So it looks a bit like this.

So what we need to have, which I'm sure you all have, but I don't know how clear they are. What we need to have are clear sets of standards about how we do things in this team or in this organization. So that looks like this.

Now that starts to chop up all of these different levels of work that are produced or communication quality. And all of a sudden, we've got some people who are below expectation. Now what happens is leaders come in and they say, "Here's north." And so your job as a manager is not just to manage minimum expectations. It is also to lift the team at the same time. So all of a sudden, your people down the bottom start to look like they're really holding you back, which they possibly are.

So one of the fastest ways to close gaps is to have expectations, discussions. And what I'm talking to you about sounds so obvious, but actually very few managers have this kind of discussion.

So when I'm talking about these discussions, I'm talking about pulling together important and disparate aspects of the way that we work. So we've got communication,, we've got ways to work, we've got technical work, we've got professional standards, we've got how we're going to deal with clients, how we're going to deal with conflict, how we're going to change. All of this, there's a million things there. And your team will have expectations and you have expectations.

So what we're talking about is coming together and agreeing. What are my expectations, what are yours? And let's agree on collective expectations. Let's agree as a unit, or set of two, or a set of four, how we do this, upfront explicitly.

Here's some examples. Now again, you've got these in your slide, so you can refer to them later. I'm not going to read them all out here. But essentially, what you are doing is making the way you work across any of these areas explicit and agreed.

So you might look at this one on communication expectations, which of course as you all know is vital. 10 years ago it wasn't even a discussion. Now it's critical. So you might say, "I tend to send email at all hours because I work around my family. I have no expectation that you respond as you receive them, only that you're responding in line with the commitments that we have."

Now, again, when I work with clients... Well, maybe you wouldn't, but many people would be surprised by the amount of time spent discussing how people handle email. And I've got leaders, executive leaders saying, "I put all my emails into draft and then I send them the following morning, because I don't want my team to see me working at night. And sometimes when I send them in draft, people have responded in between when I drafted the email and when I sent it. So my email is wrong by the time it's sent, or it's out of date and it looks out of sync, and then I have to write it again." So we've got executive leaders wasting a whole heap of time to manage perception because they haven't had this discussion. And this is true of all of these areas. Now, if you are spending time reworking and there's friction around this stuff, then you are not focused on north.

So part of managing is about elevating clarity so that we don't get distracted, so that we can just get on with chasing the goal, looking for north, and focusing on those problems. Not dissolving into friction around any of these areas. You don't want friction around communication, or performance expectations, or flexible ways of working, or conflict resolution, or how we manage clients. We want to have explicit discussions about how we're going to do this. It doesn't mean everyone agrees.

But as you all know, when we have the discussion and we hear all the views, most people say, "Okay, well I don't agree, but I'm getting on board because I get it." And it's not about agreeing every time, and we win some and we lose some. But what we want to do is make all of this and bring clarity so that we can get on with focusing on north.

So I'd really encourage you to think about possible areas for expectation discussions in your team. And you can use any opportunity to set these. So you might say, "Look, it's a new project," and it's going to be a really tough one. Or it's a new financial year, or we've got a new client. Let's have a discussion about how we're going to do this. And you can revisit that every month. If people are saying, "Look, there's just too much going on," then you can revisit and have another discussion.

So these are fluid. And again, they're designed to help you find a way. So you might have a discussion about hours of working over the end of the financial year, where everybody agrees that there's one weekend, we are all going to work through that weekend. We're going to punch through all of the work, and we will have two to three days off each within the following couple of weeks to make up for that. But you have that discussion so that everybody's clear. And what that does is allow us to get on with the work.

So there's lots of ins to have these discussions. For those of you that have been leading teams for a long time, just find an excuse to have the discussion and start. And you can have the discussion and agree at collective agreements or expectations on small things, like how we're going to give and receive feedback, or how we're going to resolve matters of conflict. What are our ground rules? What do we agree is okay, and what's off the table, what's not okay? And it's part of the role of managers particularly to facilitate this. So it's not performance expectations in three years time. It's performance expectations of this project, in this team, with this client.

So I'm going to leave you to think about that. And the other aspect I wanted to talk about as part of this art and science of work management is the level we manage tasks at. And again, this is really important for effectiveness, and our own biases, and our preferences can really get in the way here as managers.

So when we manage a task, when we delegate or assign, there's really four levels that we can manage at. I'm going to go through the four levels in a moment. Actually, I'll go through them now and I'll talk to them. So level number one is the highest level, which is purely directional. So that's where I say to you, "Deb, this is what needs to be done by three weeks." And you go away and you do it, whatever it is. So that's the directional level.

The second level is what's called the boundary level. So this is where I say to you, "Deb, this is what needs to be done by three weeks, and these are the parameters we need to work within. This is the budget we have, this is the resource allocation for that. This is the political issue that you need to consider when you're drafting your thoughts." So I just give you the 5 or 10% that sits at the boundary that you need to know, the parameters, rather than the core.

Level three is the milestone level. So this is where I might say to you, "Deb, this is what needs to be done in three weeks. These are the parameters, this is the politics, this is the resourcing, this is the audience, and can you come and check with me at point A, K, and W?" So I'm asking you to check in with me at major milestones in the work. Or the milestone might be, "Can you come and check with me on week one, week two?" So it could be a time milestone or a work milestone.

And then the final level is the detailed task level. So this is where I say to you, "Here's what needs to be done in three weeks. These are the parameters, the politics, the resourcing. These are the major milestones, and here is the list of tasks that I want you to carry out. And I want you to check in with me at every single task." So they're the four options.

Now, perfectionists operate almost exclusively at levels three and level four, often at level four when that's not necessary. So managers who are micromanagers and perfectionists will operate here at detailed tasks. Now, if you've ever been managed by a micromanager, you will know that that's often not helpful and not appropriate.

Whereas often leaders will can be at the other end of the spectrum. So they like just being given direction, so that's what they give. And their team of floundering, they don't know what to do.

So part of allocating work well and delegating well is balancing the level that you manage at with the task difficulty and the person's level of development. So if you've got a brand new person, then you probably do start managing at the detailed or milestone level. If you've got somebody who's very experienced, there is no need to manage at that level generally, unless the task is really important or really complex.

So it might be a board report, for example. Even though the person's very experienced, you might say, "Let's check in at the key milestones so that we avoid rework." So when we're allocating work as a manager, and we need to think about the task complexity with the person's level of readiness. And if we can get that right, we also then just allow ourselves and the person to get on with the job, to focus on north, rather than us being too much

on the dance floor, or too much on the balcony, and that person flounders. So again, I'll leave you to consider that.

So when we're talking about management, what we're talking about is getting very effective at the way that we mobilize the resources we have, the people we have, the time we have, the level of energy that we have, and decision making capacity that we have. Along with the work that needs to be done in order to roll up to those areas of leadership, those goals. That's certainly the wildly important goal and the key goals that sit underneath them.

And so things like setting expectations, managing work levels appropriately are vital for managers. And for leaders, what's vital is setting direction itself and goal clarity. And then also, identifying those adaptive challenges that if we leave it too late, we risk getting left behind. And there's more and more of them coming, as you all know.

So being able to develop the skills to set direction, and to inspire people to reach that, and help them overcome the challenges that are part of that, as well as focus on the day-to-day, mobilize your people, and your resources, and your time, and your cash really effectively. This is how the two work together.

So I hope that's given you an overview of the role of both in finding a way to the goals that are really important for your team or your organization. And that is it for me today. I'm happy to hand over for questions, Alison. Thank you.

CCH Learning:

Thank you very much, Deb. Okay, so we will be spending the last section of this webinar taking questions. So feel free to type them into the questions pane that you can see there, and I can pass those to Deb. All right, in the meantime, I will just quickly mention our upcoming webinars.

So tomorrow, we are looking at the End of Financial Year Guide, 27 July is Referrals for Revenue Growth, 1st of August we have our [inaudible 00:54:22] update and SME Structuring, and The Role of Trusts in Estate Planning and then looking at Investment Properties. So if you jump on the CCH Learning website, you'll be able to find the details of all of those sessions and many more as well.

All right, Deb, we'll have a look at these questions here. So first one is from Caitlyn, and she's just asked, "What is your tip for staying on the course on this and not getting lost in the day to day?"

Deb Assheton:

Yeah, good question, Caitlyn. Thank you. I think staying the course is about having enough time set aside on the balcony, as I said. So enough time each week to reflect on where are we going, what are the priorities, what feedback am I hearing and what do I need to do differently? What are some of the adaptive challenges out there facing my team or my organization? So I think it is about having reflection time that allows you to stay the course.

And then secondly, also, managing your own energy and time so that you are not working 80 hours a week and expecting to be able to sustain that over the long term. Really, you should be having manageable working hours and manage your energy well, so that you can stay the distance over two or three years. So thank you.

CCH Learning:

Thank you Deb. And last question that's come through for the moment. This one's from Christian. "Should I give feedback to others on this, where I see they have the balance between leading and managing wrong?"

Deb Assheton:

Good question, Christian. So my first thought on that would be make sure that your balance is really strong and focus on yourself at the outset. And people learn a lot from somebody who's effective just by watching them. So you can help to shift the culture just by being and doing you if you are in a good space and you're really effective. So that'd be the first thing I'd say.

Once you're in that space and you do see somebody who you can see or you feel has it out of balance, then yes, I think you can broach feedback. And you've obviously got a number of choices in the way you do that, depending on the topic and the person. So you could, at the right time, share some stories about how you've changed your focus and found yourself more effective. Or you could just open up and have a discussion that's feedback oriented where you make a suggestion to the person or wait for an in, so to speak, the opportunity to have that discussion.

So I do think the answer is yes, I just think it's important to tread with care so that we don't come across as judgmental at all. Thanks.

CCH Learning:

Makes sense. Thank you Deb. All right, that is all the questions that have come through for today. So we'll just look at our next steps here. All right, so in terms of a feedback survey, that will pop up at the end of the webinar for you, please just take a moment to pop your opinions in there. And shortly after the session today, we will send you an email letting you know when the e-learning recording is ready. You can also access the PowerPoint, transcript, and your CPD certificate as well.

So thank you very much to Deb for the session today, and thank you to everyone in the audience. We hope to see you back online for another CCH learning webinar very soon.

Deb Assheton:

Thank you.