



# Make the Mental Leap to Leader

A Six-Step Guide for First-Level Leaders

FranklinCovey



If your mentality toward work hasn't changed significantly since you became a first-level leader, it's likely you're not actually leading. Leading people is vastly different from working as an individual contributor.

Leading people is different from working as an individual contributor. You need to shift how you think and what you do in order to succeed in your very challenging and rewarding role.

Here are six critical steps you can take.



# 1. Shift how you think and what you do

Focus on getting things done through other people (instead of doing things yourself).



**Seeking, organizing, and communicating information is real leadership work that, when done well, allows you to leverage your team for a much greater impact than you could ever achieve on your own.**

You may have tremendous technical skills — and maybe they're even a big reason you were promoted — but those skills won't carry you as a first-level leader. Getting great results from a team of individuals requires a whole different skillset. The primary measure of your performance isn't how many sales deals you close or how much code you write or how terrific your analysis is — it's how many deals your team closes, how much code your team writes, and how terrific your team's analysis is.

This sounds like a simple shift, but many first-level leaders struggle with it. To some, all those meetings with direct reports and up-and-across conversations don't feel like "real work." But seeking, organizing, and communicating information is real leadership that, when done well, allows you to leverage your team for a much greater impact than you could ever achieve on your own.

## **Embrace the mindset**

Carefully select and shape your team goals so they will align with your organization's goals and other initiatives.

- Consider, plan, and communicate the details:
- What does an ideal outcome look like and can you explain it clearly to your team?
- How will you organize and delegate the work? How much guidance does each direct report need to achieve that ideal outcome?
- How will you get what your team needs from others across the organization?
- Once the work is underway, what course correction needs to happen for the plans to work?

Great leaders understand that they can't determine these things in isolation. It takes two-way conversations, meetings, and other real leadership skills to accomplish this.



Every time you help someone overcome a challenge, meet a goal, take on something new, see themselves as more capable, or feel more engaged at work, you're making someone's life better, not just getting work done.



## 2. Connect with your direct reports

Connect with your direct reports as people so that you can help them do their best.



**Get to know your direct reports — what's important to each person and how you can best help them thrive. The more you help others succeed, the more you'll succeed. It's a true win-win.**

Just about every decision you make at work impacts your direct reports' lives — and not just how they spend their working hours. First-level leaders can have a huge influence on people's livelihoods, professional growth, careers, and personal happiness. Sound daunting? It can be. But think of the opportunity: Every time you help someone overcome a challenge, meet a goal, take on something new, see themselves as more capable, or feel more engaged at work, you're making someone's life better, not just getting work done.

Get to know your direct reports — what's important to each person and how you can best help them thrive. The more you help others succeed, the more you'll succeed.

### **Embrace the mindset**

If you don't already have regular 1-on-1s with each direct report, schedule and start holding them now. Make them sacred — don't cancel. This is dedicated time for building a stronger relationship, coaching, discussing career development or anything else the person needs to succeed in their role and grow for the future.

You may be accustomed to leading conversations, but be careful not to dominate your direct reports' 1-on-1s. You'll have more meaningful, revealing conversations if you ask thoughtful questions and spend most of the time really listening.

## 3. Choose your words wisely

Choose and use your words wisely — your feedback influences others' behavior.



**Feedback can be a huge motivator. It shows direct reports that you are paying attention, that you recognize their efforts, and that you care about their progress.**

Are your direct reports doing good work? Great work? Could it be better? While they have their own opinions, they're also looking to you — the one responsible for evaluating their performance — for feedback to help them learn where they stand.

Well-delivered feedback is one of the most powerful tools a first-level leader has to influence direct reports' behavior because it helps define and clarify your expectations, gives people insight into the impact of their actions, and provides clear direction on what they should be doing more of and less of. It can also be a huge motivator, showing direct reports that you are paying attention, that you recognize their efforts, and that you care about their progress.

Still, most first-level leaders don't give enough feedback, despite its vital importance.

### Embrace the mindset

Meaningful feedback, whether reinforcing feedback or redirecting feedback, should be a conversation. You might even start a conversation by asking, "What do you think about the way you X?" before offering your own perspective.

To ensure your feedback is usable, root it in an observation of a specific behavior (e.g., "I noticed that you sent a detailed agenda ahead of time") followed by its impact (e.g., "That really helped everyone prepare for the meeting, so we got a lot more done"). To be sure you're giving enough feedback and distributing it fairly across your team, consider setting a weekly quota for the number of times you give feedback to each direct report.

## 4. Always be learning

Always be learning, even when it's uncomfortable.



**There is no “perfect leader”, but a leader that learns from their mistakes, makes adjustments, and improves over time is the next best thing.**

A first-level leader's job is so complex that it's impossible to be great at everything you do. To make matters even more challenging, the context of every situation matters. An approach that worked for you with one individual or in one situation may not work with another. But here's what you can become great at: Learning from your inevitable mistakes, making adjustments, and improving over time.

It also may help to preemptively identify some areas where you're weaker. For example, do you typically excel at solving detailed problems but struggle with influencing higher-ups? If you know that about yourself, then you may want to focus on improving how you advocate for yourself and your team, and also possibly rein yourself in if you're tempted to get involved in every detail of your team's work (no one likes a micro manager).

### **Embrace the mindset**

Seek feedback — from your direct reports, from peers and mentors, from your leader — to learn how you're coming across to others and what you could be doing better in specific aspects of your job (it's impossible to know your blind spots without asking). It can be uncomfortable and even personally painful to open yourself to criticism — nobody wants to hear how they're falling short. But it's critical to build your self-awareness and course-correct before a habit does significant damage to your team or career.



Seek input and advice from experienced leaders, mentors, and peers whose skills you admire.

Having a strong network of advisors can help you avoid mistakes and realize that you're not alone in your challenges.





## 5. Navigate a clear path

Tap your resilience to lead through ambiguity and change.



**It's your responsibility to communicate with your direct reports about what you know (and don't know!) and then lead them forward effectively.**

As a first-level leader, you're supposed to be in charge. But with shifting organization strategy, restructuring, unclear priorities from your leader, and other waves of change and uncertainty, you may feel like you don't have the control you thought becoming a leader would bring.

Yet, it's your job to navigate a clear path forward for your team. If you're freaking out in the face of uncertainty or putting on a happy face and acting like everything's completely fine, your team will notice your behavioral cues and not only feel as unmoored as you do, but potentially start to disengage.

To guard against this, foster self-awareness about how you typically react to uncertainty and change so you'll be better equipped to manage your emotions and calmly assess your situation (both the opportunities and challenges). And don't forget that while you may have very little visibility into the organizational changes upending your day to day, your team has even less context and access to information. It's your responsibility to communicate with your direct reports about what you know (and don't know!) and then lead them forward effectively.

### Embrace the mindset

Take a balanced approach to assessing your situation because defaulting to worst-case scenarios or relentless optimism won't help you in the long run and won't do a thing to allay your team's fears and concerns. How do you feel about a change? What do you and your team stand to gain and lose (it's important to acknowledge both)? How can you help the team move forward?

Then, communicate clearly with your team about what's going on, why, and how it affects their work. Pay careful attention to how your team members respond and look for opportunities to unite and motivate the team, regardless of whether you see a potentially bright future (e.g., *"This new direction presents a great opportunity for us to X because ..."*) or tough challenges that your team can rally around (e.g., *"I realize this round of layoffs will mean extra work for us. It's going to be tough, so we'll need to work together ..."*).

## 6. Manage your energy

Manage your energy so you can work sustainably without burnout.



**You need a clear, calm mind and healthy body to be able to focus, manage your emotions, and make good decisions.**

If you're a typical first-level leader, your work gets cut into slivers by meetings, interruptions, and mentally switching back and forth between big-picture thinking and daily troubleshooting. You face business problems and people problems, and at the end of some days, you'll find your to-do list longer, not shorter, despite your best effort.

In an attempt to get it all done, you may skip morning workouts, eat lunch at your desk, finish up emails before bed, and let work spill over into your weekends. These strategies may even feel more productive—for a while. But you can't keep it up long term. And besides, your own chronic overwork sets a bad example for your team.

Leading is a marathon, not a sprint. You need a clear, calm mind and healthy body to be able to focus, manage your emotions, and make good decisions. So how do you achieve those things in the whirlwind of your workdays? Start by diligently prioritizing your time on the most important work—and keep in mind that one of those “most important” things is self-care.

### **Embrace the mindset**

Build a habit of regularly prioritizing your most important work so you keep your workload realistic and don't waste precious energy. And do a personal assessment of your work/life balance, attitude, and health habits—specifically how you eat, exercise, and sleep. Depending on what you learn, you might set a new work/life boundary, work on managing your emotions, schedule regular exercise, tweak your diet, or try tactics to get better sleep.

For additional information about how first-level leaders in your organization can make the leap, email us at [info@franklincovey.com](mailto:info@franklincovey.com), visit [franklincovey.com](http://franklincovey.com),

Or call us at:

1-888-868-1776





