The New Manager Toolkit

Everything you need to make the transition from colleague to manager

Becoming a manager is one of the most significant career transitions you can make. Suddenly, success is no longer measured solely by your own performance but by your ability to support, engage and develop others. This toolkit provides practical guidance, templates and resources to help you build confidence, establish credibility and lead your team successfully from day one.

A tried, tested and trusted approach by North West Employers.

Your First 30 Days

New Manager Checklist

Don’t be daunted. Your first few weeks set the tone for your leadership journey. Focus on understanding your team, building relationships and gaining clarity on priorities before making significant changes.

Week 1

☐ Meet every team member individually & note their feedback. Ask them what their expectations of you are; understand any home commitments they may have and note any previous complaints or proposals they have made.

☐ Understand your team's objectives and current priorities

☐ Review performance, absence and workforce data to give you a holistic view of your team

☐ Clarify expectations with your own manager

☐ Introduce your management approach to the team

Weeks 2-4

☐ Hold your first team meeting with a clear agenda sent out in advance so that they know what to expect from the start. Give everyone the chance to speak and air their views

☐ Schedule regular one-to-ones

☐ Identify quick wins and immediate challenges

☐Understand the business key strategic priorities and how they relate to your role and to your team

☐ Learn key processes and policies

☐ Build relationships with stakeholders and partners

☐ Create a personal development plan for yourself as a manager

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Questions to Ask Your Team

Taking time to listen helps build trust and demonstrates that you value people's experience and perspectives.

Consider asking:

About Their Role

- What do you most enjoy about your work?
- What are your biggest challenges?
- What would help you perform at your best?

About the Team

- What does our team do particularly well?
- Where could we improve?
- What barriers make delivery more difficult?

About Management

- What support do you expect from your manager?
- How do you prefer to receive feedback?
- How often would you like us to meet?

About Development

- What skills would you like to develop?
- What are your future career aspirations?
- How can I help support your growth?

First Team Meeting Template

Purpose

To introduce your leadership approach, create open dialogue and establish team priorities.

Suggested Agenda

Welcome and introductions

- Share your background and leadership style
- Set a positive and collaborative tone

Team priorities

- Review current objectives
- Discuss key challenges and opportunities

Ways of working

- Communication expectations
- Team values and behaviours
- Meeting arrangements

Open discussion

- Questions and feedback
- Suggestions for improvement

Next steps

- Actions and responsibilities
- Date of next team meeting

One-to-One Meeting Template

Regular one-to-ones are one of the most valuable tools available to managers.

Agenda Structure

Check-in

- How are you?
- What's been going well?

Work and priorities

- Current workload
- Progress on objectives
- Challenges or barriers

Development

- Learning opportunities
- Skills development
- Career aspirations

Support required

- Actions for manager
- Actions for employee

Summary

- Agreed actions
- Review date

Managing People

Setting Expectations

People perform best when expectations are clear.

Good managers:

- Explain what success looks like
- Clarify individual responsibilities
- Set measurable objectives

- Agree priorities
- Discuss expected behaviours and standards

Remember: clarity reduces confusion, improves accountability and helps people succeed.

Giving Feedback

Feedback should be regular, specific and constructive.

Effective Feedback Framework

Situation Describe when and where the behaviour occurred.

Behaviour Explain what you observed.

Impact Discuss the effect on colleagues, customers or outcomes.

Tips for Success

- Give feedback promptly
- Be specific rather than general
- Focus on behaviours, not personality
- Balance developmental and positive feedback
- Encourage two-way discussion

Managing Performance

Performance management should be an ongoing conversation rather than an annual event.

Effective managers:

- Set clear objectives
- Monitor progress regularly
- Recognise achievement
- Address concerns early
- Provide support and development opportunities

When performance issues arise refer to any previous internal performance issues and review your organisations performance & capability policies and procedures before you:

1. Identify the root cause.
2. Clarify expectations.
3. Agree improvement actions.
4. Monitor progress.
5. Provide continuous support.

Having Difficult Conversations

Avoiding difficult conversations rarely solves problems.

Before the Conversation

- Gather facts
- Review their work history – what are the themes arising from their behaviour
- Prepare your key messages
- Consider the individual's perspective
- Consider the impact on the wider team & on the business as a whole
- Focus on desired outcomes

During the Conversation

- Be clear and respectful
- Listen actively
- Ask open questions
- Stay focused on facts and behaviours
- Agree next steps

After the Conversation

- Document actions in an email to them
- Keep a record of the meeting date / time / what was agreed
- Provide a copy to HR for their personal file
- Provide ongoing support

- Follow up regularly

Managing Absence

Managing absence effectively supports both organisational performance and employee wellbeing.

Key principles:

- Maintain regular contact by email
- Follow organisational policies
- Conduct return-to-work discussions
- Identify patterns and trends
- Explore underlying causes and where the organisation can provide support, via a ‘Employee Assistance Programme’
- Consider reasonable adjustments where appropriate, such as a flexible work pattern

Focus on support first while ensuring consistency and fairness.

Supporting Wellbeing

Wellbeing is fundamental to engagement, performance and retention.

Managers can support wellbeing by:

- Encouraging regular breaks
- Monitoring workload
- Creating a supportive team environment
- Promoting flexible working where possible
- Signposting available support services
- Ensuring health & safety guidance is followed
- Modelling healthy behaviours

Remember: you don't need to solve every problem, but you do need to create an environment where people feel able to seek support.

Leading People

Delegation Checklist

Delegation is about developing capability, not simply handing over tasks.

Before delegating ask yourself:

☐ Is the outcome clear?

☐ Does the individual have the skills required?

☐ What authority do they need to progress this task?

☐ What support will be available to them?

☐ What timescales have been agreed and are they realistic?

☐ How will progress be monitored?

☐ What learning opportunities does this provide?

Successful delegation increases ownership, confidence and growth.

Coaching Questions

Coaching helps people find their own solutions and develop independent thinking.

Try asking:

Exploring the Situation

- What is happening currently?
- What is the real challenge?

Creating Options

- What options have you considered?
- What else might be possible?

Building Action

- What will you do next?
- What support do you need?
- How will you measure success?

Great managers spend less time providing answers and more time asking questions.

Building Psychological Safety

Psychological safety exists when people feel able to speak up, share ideas and admit mistakes without fear of negative consequences.

Managers can create psychological safety by:

- Encouraging different viewpoints
- Admitting their own mistakes
- Inviting feedback
- Listening with curiosity
- Recognising contributions
- Respectfully challenging behaviours

When people feel safe, innovation, engagement and performance improve.

Motivating Different People

Different individuals are motivated by different factors.

Some are motivated by:

- Achievement
- Progression opportunities
- Recognition
- Purpose and impact
- Learning and development
- Team relationships
- Flexibility and autonomy

Take time to understand what matters most to each individual and tailor your approach accordingly.

Developing Your Leadership Style

There is no single "right" leadership style.

The most effective leaders understand their natural preferences while adapting to meet the needs of their team and situation. Remember, every team member requires an individual approach.

Reflect on:

- What are your strengths as a leader?
- How do others experience your leadership?
- What feedback have you received?
- How do you communicate under pressure?
- What leadership behaviours do you want to be known for?

Leadership development is a continuous journey of reflection, learning and growth.

Want to Develop Confident, Capable Managers?

Supporting new managers with practical tools is only the start.

At **North West Employers**, we help organisations build leadership capability through a range of management, leadership, HR and organisational development programmes designed for the public sector.

Whether you require development or you are developing aspiring managers, newly appointed supervisors or experienced leaders, our programmes provide the skills, confidence and practical approaches needed to lead people effectively and deliver successful outcomes.

Explore:

✅ Leadership Development Programmes

✅ First Line Manager Development

✅ HR and Employee Relations Training

✅ Coaching and Mentoring

✅ Organisational Development Support

✅ Bespoke In-House Training Solutions

Explore North West Employers' leadership development and HR training programmes and invest in the managers who will shape your organisation's future.

Email one of our experts:support@nwemployers.org.uk or call 0161 834 9362.

Alternatively visit our website to find more information and support:
www.nwemployers.org.uk