Orchestrate:
Four Productivity Skills Every (Mid-Level) Manager Needs

Executive Summary & Exercise Workbook

Introduction

We move up a series of learning curves throughout life. We learn to walk and then to spell. We matriculate through grades in school, eventually earning a degree. We then enter the work world. First, we're doers, performing the tasks we're assigned. The next step is to manage other doers.

Moving from doer to manager is the focus of this program. We'll cover four fundamental skills to facilitate the transition:

- Consideration
- Collaboration
- Communication
- Coordination

Managing others is always challenging. Honing these skills makes it easier.

Consideration

Ironically, introspection is the first step in effectively managing others. We must build a framework around which to develop our management style. This process will identify our existing strengths and weaknesses, allowing us to focus our efforts in specific areas.

One note: Consider reviewing this chapter and its exercises annually to continue improving.

1. Take an Inventory of Skills

Skills Scorecard

Spend a minute reviewing the list and grading your proficiency with each skill. A "1" indicates low proficiency, and a "5" indicates high proficiency. Place a check in the appropriate box.

Productive Management Skill	1	2	3	4	5
Speaking – Privately (to one other person)					
Speaking – Publicly (to at least two other people)					
Listening					
Relationship Building					
Delegation					
Running Meetings					
Managing Work Flow					
Measuring Mood					
Motivating Others					
Planning – Strategic					
Planning – Tactical					
Delivering Feedback					
Pursuing Opportunities					
Managing Up					

Good managers remain mindful of ways to improve their own skills with the goal of enhancing the team's results. The *Skills Inventory* identifies which managerial skills are proficient and which need attention.

New managers often feel they are deficient in most of the preceding skills. That's rarely the case. The reality is that we haven't considered our existing skills from a management perspective.

For example, take public and private speaking. New managers feel that their public speaking skills are weak but that their private speaking skills are adequate. The reality is that the opposite is often true. That's because, though intimidating, most public speaking requires preparation and practice. Private speaking—conversations—rarely receive that focused effort. Thus, we are often less effective in our conversational speaking skills than we need to be.

2. Identify Management Tenets

How should we treat each other at work? What values matter most to you and your team?

The *Key Management Tenets* exercise in the on-demand program ferrets out what matters most as they relate to working in and with teams.

The reality is that all the tenets listed are important, but it's impossible to abide by all of them every day. Getting the list down to five makes the effort manageable. The next exercise—*The Few That Matter*—further clarifies what matters by asking us to list the five key values in order of their relative priority.

Key Management Tenets

Spend a minute reading through the list of values. Check the box next to the ***five*** values you feel are most important for a good manager to possess and demonstrate.

Table of Values			
☐ Dependability	☐ Honesty	☐ Responsibility	☐ Vision
☐ Adaptability	☐ Integrity	☐ Compassion	☐ Initiative
☐ Efficiency	☐ Forgiveness	☐ Authenticity	☐ Availability
☐ Collegiality	☐ Accountability	☐ Patience	☐ Creativity
☐ Balance	☐ Reliability	☐ Respect	☐ Dignity
☐ Cooperation	☐ Humility	☐ Ambition	☐ Enthusiasm

The Few That Matter

Every tenet listed above is important. We should abide by them all. But the reality is that we can't—not on a daily basis. It's better to excel at a few than be mediocre at many.

Now, look at the five you selected. Write them down in their order of highest priority to lowest priority. Again, the perspective is that of a manager.

Prioritizing Values	
1.	
2.	
3.	
4.	
5.	

In her book *The Upside of Stress,* author Kelly McGonigal states that identifying our values

gives us an anchor in life that allows us to persevere. This value anchor lets us associate a current struggle with a long-term reward. It helps us demonstrate our values throughout the busy day.

3. Establish Ground Rules

Managing is easier if we've considered how we want to interact with the team and each team member. Think of these as the ground rules we follow with everyone. Don't confuse these with goals or objectives; these are the rules of the road as far as how we treat our team and others during the day.

Here's a start on a good list of managerial ground rules:

- **Attitude Is Everything.** Our attitude, and the attitude of others, can help or hinder our individual and collective efforts. Attitude is a choice. Choose carefully and encourage others to do the same.
- **Treat Team Members Equally.** Connection among team members varies. Managers must extract each person's best efforts. Favoritism undermines that effort.
- **Be a Problem Solver.** There are problem spotters and problem solvers. Problem solvers take responsibility for getting things done and, as a result, are more productive. Foster problem solving.
- **Avoid Open Criticism.** Critiquing work performance is vital to team performance. However, open criticism of others (as well as gossiping) never moves the team forward.

Can you think of one or two rules to add to the list?

1. _____
2. _____

Knowing our strengths and weaknesses lets us focus on our skill-building efforts. Demonstrating to others what we value encourages strong team cohesion and performance. Establishing guidelines for treating others garners respect from our team

members, which also drives productivity and results.

Collaboration

Collaboration is the ability to work well together to achieve a common result or business benefit. Several aspects to collaboration determine managerial success: building relationships, measuring mood, and motivating others.

1. Building Relationships

Managers have a unique tightrope to walk. There are many levels of authority within most firms, with managers falling somewhere in the middle. It's our job to know those levels and who possesses that authority. Building and maintaining good relationships among those individuals greatly improves the collaborative environment necessary to be an effective manager.

Most professional firms are matrix managed, which is a different animal. Firms usually have an identified leader—a managing partner or someone similar. The managing partner *may* work with (or report to) an internally elected executive committee. Below that, there are practice group leaders (or someone similar) who focus on a specific area of expertise and coordinate the other professionals in that area.

Productive managers know which relationships will bear the most fruit. The fruit in question is acquiring resources and smoothing pathways to fulfilling clients' needs. Three groups influence a manager's ability to deliver:

- **Those Above.** Every manager reports to someone. Getting to know those in authority above us is a good way to both understand what's expected of us and develop a host of resources for achieving the team's goals.
- **Those Across.** Colleagues, especially those in similar positions, are a great resource for advice and problem solving. Moreover, many of those people will grow in their careers along with us, meaning that we may be working together for a very long time.
- **Those Below.** The strongest relationships we build are with our direct reports, as we interact with them every day. We also rely on their efforts on a daily basis to do the work we're charged with completing.

Our relationship with the people in each group is different. However, common threads can connect us to them. Here are ways we can build strong relationships with those around us.

Ingredient	Value
Communicate a Common Goal	What is the common goal shared with this person? Is it a firm objective or a client objective? Identifying and communicating that shared goal binds us together in achieving that result.
Demonstrate Managerial Tenets	We listed our five top managerial tenets in the "Consideration" chapter. Demonstrating those beliefs through our actions is a great way to find those with similar beliefs, which can then lead to bonding with these individuals.
Preparation and Directness	Being prepared and (politely) direct with our coworkers demonstrates our respect for their time. Demonstrating respect for another's valued resource ingratiates us with them.
Professional Altruism	There's no greater way to build relationships with people than to do something for them. Complete a task they can't get to, or help solve a problem collaboratively. If it's done for their benefit with no expectation of return, they will see you as an ally, and we all support our allies when they're in need.

Pick-Three Exercise

Take a minute to think of the people orbiting your professional world. Select three of them with whom you can build a stronger relationship. Complete the chart below—add their names; whether they're above, below or across from you; and describe one action you'll take this week to increase your bond with them.

Name	ⓅΔ	Action This Week to Bond

2. Managing Mood

People get paid to show up and do work. How *well* they perform is largely related to how they feel. It's true: Emotions do play a huge role in performance.

Managing difficult people is something all managers face. It can be even more difficult in professional firms, given the matrix management environment and the lack of clear lines of authority. However, we can exhibit a number of behaviors that will enhance our team's performance.

Behavior	Positive Effect
Attitude Is Contagious	We have two choices whenever something goes wrong. We can attack it with vigor or complain about it. A report in the *Journal of Applied Psychology* offered evidence that a manager's attitude is infectious. Choosing a positive attitude when dealing with problems has positive upsides and no downsides.
Mirror Others	When we align our behaviors with those of the people around us, we're mirroring. If they speak quickly, we speak quickly. If someone is quieter by nature, we quiet down a bit. We all feel more comfortable with those who are like us!
Use Humor	Finding humor throughout the day is a terrific way to bond with others. Laughter is often called the elixir of society, and for good reason. Our brains release the feel-good chemical dopamine into our systems every time we laugh!
Stay Calm	We all want leaders to appear calm. It makes us feel safer. Even if we feel chaotic inside, exhibiting a calm demeanor to our team will help them remain focused and productive.
Go Green	Consider going outside, especially to someplace green (like a park), when things are frantic. Even a short stroll in nature can calm us down and get us focused again. Maybe the entire team could brainstorm solutions while walking outside together?

3. Motivating Others

Effective managers understand that individuals make up the team, so focusing on individual needs and aspirations plays a significant role in overall team performance.

Esprit de corps literally translates to "the common spirit existing in the members of a group and inspiring enthusiasm, devotion, and strong regard for the honor of the group" (according to Merriam-Webster Online). That spirit has to be created. One of the best ways for a manager to develop *esprit de corps* is by coaching individual team members.

This is not about reviews or mentoring. It's about coaching, which is more subtle and specific.

Harvard Business Review reported on a study it conducted in an article titled "4 Reasons Managers Should Spend More Time on Coaching." *HBR* found that successful managers were those who believed coaching team members was a productive use of their time. The reasons behind this conclusion were the following:

- Coaching was an essential tool for achieving business goals.
- It was enjoyable to help people develop.
- Expressing curiosity in team members built strong bonds.
- Pursuing connections with individuals and among team members enhanced cohesiveness.

HBR clearly felt its research bore fruit. Good managers find ways to coach their direct reports.

Coaching is easier than it seems. Consider these suggestions if and when you decide to coach a team member:

- **Offer Constructive Criticism in Light of High Expectations.** Being honest about someone's capabilities should be clear. However, it should be framed in light of *what we believe they can achieve.* That makes the issue a solvable problem rather than an insurmountable barrier.

- **Focus on Career Path Versus Job Responsibilities.** Working with someone to develop a particular skill goes well beyond the team member's current job and its

responsibilities. Most skills are transferable and can evolve over time. Focusing on the long-term benefit helps a team member understand the true value in improving.

- **Foster Open Communication.** Only those who are deluded believe they're great at everything. Identifying a skills deficiency will rarely come as a big surprise to those being coached. In fact, they may be frustrated by their lack of abilities. Moreover, improving can be hard and take a significant amount of time, depending on the skills being addressed. Explore individuals' assessments of their abilities and draw out any associated emotions. Open communication allows emotions to vent, which leads to better focus and a return to productive efforts.

- **Establish a Practice Environment.** Improvement takes practice. Failure is part of practice. A good coach develops an environment where the individual can "practice" the skill in relative safety. The practice environment varies by skill, so consider how the person can practice without risking too much failure.

Who Ya Gonna Coach?

Take a minute and think about your team. Identify one person who has a skill that needs improving. Jot down that person's name and the skill that needs be improved upon. Next, identify what value improving that skill has to that individual. Finally, list two ways you will help coach him/her toward that improvement.

Name	Skill Issue	Value to Them	Coaching Action

Productive managers are those who build strong relationships with their teams, focus on how emotions play a role in performance, and seek ways to facilitate each person's advancement through skills improvement.

Communication

Good managers develop and refine their communication skills. Communicating well greases the wheels of commerce. It builds strong relationships among team members,

colleagues, and clients. This chapter focuses on three aspects of communication that managers can hone to achieve positive results.

1. Speak Clearly

We spend about 60 percent of the time talking about our favorite subject—ourselves! Rarely is effective communication about us, so we need to identify some easily followed guidelines to improve this skill. The end game is to transfer what's in our head to the listener in the most efficient manner.

Communicating is a holistic experience. We use words, tone, and body language when we're communicating. A famous study conducted by Albert Mehrabian described how much each part of the message content contributed to the listener's understanding of the message.

Message Content	Percentage of Meaning
Words	7%
Tone	38%
Body Language	55%

Although some have challenged these specific findings, just about all agree that these three communication components contribute to the message being communicated.

Here are three recommendations to keep communicating in a crisp and clear manner.

Recommendation	Why It's Important
Communicating Is More Than Just Words	Be aware of tone and body language when talking with a team member. Any tension or lack of interest will quickly be indicated if it exists.
Preparation Is Always Necessary	Preparing in advance always produces a better result—for any type of interaction. Take a minute before a meeting to jot down the key points to be communicated. Refer to the list during the conversation, checking off those you've covered.
Brevity Is Beautiful	Marty Nemko, a National Public Radio (NPR) host, offered the following "traffic light" strategy for maintaining a listener's attention:

	▪ *Green Light*. The listener likes us for the ***first 20 seconds***, provided we're on point. ▪ *Yellow Light*. The listener begins to lose interest ***at 30 seconds*** and wonders how long-winded we are going to be. ▪ *Red Light*. The listener has completely lost interest and attention ***at 40 seconds,*** and we're now talking to ourselves.

In addition to good preparatory habits, take care to remove these filler words/phrases from our communications:

- Actually
- Like
- You Know
- Ah/Um
- Right
- Well
- I Mean
- Really

Filler words detract from communication. These words reduce confidence in the listener, and they unnecessarily extend the length of what we're saying. Self-monitor, or ask others for assistance, to reduce the use of filler words. The result is crisper, more effective communication.

2. Listen Empathetically

Employees often cite good listening as their favorite managerial attribute. Ironically, it's also the least trained skill.

Why is listening such a magical skill? The simplest answer is to define the three levels of listening we use:

- **Level One.** This is basic listening, the kind that's instinctual. It's listening to things and determining their significance to us. It's completely self-absorbed: *How does*

that sound affect me? Is it friend or foe? It's normal that we spend most of our time in Level One listening.

- **Level Two.** This is inquisitive listening. The focus is directed outward, but the level of interest is only at the fact-gathering level. We are seeking to understand something the speaker is saying: *Then what happened? After that, what do I do next?* A deposition is a good example of Level Two listening.

- **Level Three.** This is empathetic listening. This type of listening is directed at the speaker, but instead of just wanting to learn something, we are experiencing what he or she is describing. We are engaged, seeing what the speaker is describing and feeling what the speaker is or was feeling: *That must have been exciting! You have certainly struggled to achieve that result.* To be Level Three (empathetic) listeners, we need to put ourselves in the speaker's position and imagine what the speaker must be experiencing and how he or she feels. Delivering feedback that confirms our efforts to do so will naturally align the speaker with us. The speaker becomes more engaged in what's being discussed.

Here's a *Good Listener's Checklist* to facilitate the process:

- Make Time
- Prepare Questions
- Let Silence Linger
- Ditch Mental Multitasking
- Close Strong

Developing good listening skills will encourage team members to communicate with us. Productive work environments are built on good communication, and it's a manager's responsibility to foster that environment.

3. Critique Productively

This section is *not* about performance reviews. Those are a wholly separate process, often formally administered by the firm. We are focusing here on helping team members improve their individual work product and working environment.

Delivering a productive critique is easy if these steps are followed.

Critiquing Element	Making It Effective

State Clear Objectives	Critiquing another's work or behavior *must* be for the team's benefit. The purpose must *always* be to improve performance and *never* be about tearing someone down.
Prepare	Like all conversations, preparing to critique a team member is vital to success. Have behavior or work-product examples on hand. Prepare a road map for the conversation. Make a list of points to cover and results to be targeted.
Set the Tone	The conversation's tone should provide direct feedback *in light* of high expectations. Begin the discussion by focusing on what is expected of the team member. Communicate confidence in the team member attaining that goal, provided that he or she develops the necessary skills along the way.
Focus on Results	Place the critique in context by explaining why the work product or behavior was deficient. The purpose is to connect the work product or behavior with the result so that the person being critiqued understands why doing better is important.
Make Actionable Suggestions	Offer actionable ways to improve after the connection is made between the effort and the result. The goal at this juncture is to craft a path to future success.
Invite Feedback	Pause through the discussion to ask for feedback or to simply be silent—inviting the other person to offer his or her thoughts. A two-way conversation about where the problem exists and how to resolve it greatly improves the likelihood of long-term success.

Staying focused on the team's goals—good work product and harmony—is a key to delivering an effective critique.

It may be patently obvious to state that communication is a key skill for managers. Speaking clearly, listening effectively, and delivering productive feedback will ensure that our team is working at its highest and best level.

Coordination

Effective managers operate like good traffic cops. Information, resources, and work tend to flow smoothly among the various constituencies. Most managers must develop a new skill when mapping near-term needs with long-term objectives. They must peer toward the horizon while minding the minutiae.

1. Delegate Effectively

Getting the right work to the right people with enough time to get it done in the most efficient and productive manner is the key to success in this area. It may sound easy, but professionals often struggle when attempting to delegate work effectively.

We would all delegate everything if it were that easy. The reality is that it takes preparation and consideration to do it well. Here are the steps to effective delegation.

Delegation Step	Description
Organize Your Work	We can't possibly delegate work effectively or efficiently if we don't have our own house in order. Adopt or develop a way to track what needs doing and when it next needs our attention.
Decide What Can Be Delegated	Determine what components or projects can be assigned to others. Factors in this decision include the skill sets required to accomplish tasks, the level of interest or challenge in the work, and the best use of available personnel.
Choose Qualified Delegatees	Delegatees should have the basic skills to perform the work being delegated. Also, what additional information or resources will they need? Finally, more experienced people can handle less defined elements of a project and those that require the application of more advanced critical-thinking skills.
Define Deliverables and Deadlines	One of the worst mistakes that delegators make is not fully defining what is expected from a task. The same holds true for deadlines. Less experienced people need more time to become efficient. Give them specific and reasonable guidance with respect to stated expectations.

Estimate the Time for the Task	Providing delegatees with an estimate of how long a task should take sets parameters around the task and gives them a yardstick to use while doing the work.
Align Attitudes and Expectations	This goes hand in hand with the preceding point. Remember, it's almost always more efficient for us to do the work ourselves. However, there are only so many hours in the day. We must align our expectations with the work and the person to whom we are delegating.
Schedule *Enough* Time to Meet	The better we explain the work, its background, and our expectations the first time, the fewer mistakes will be made and the fewer questions will arise midstream to potentially delay the job's completion.
Delegate Ownership	Do not encourage delegatees to ask questions during every step of the process. Let them know that they're expected to make decisions on their own. If they truly have a question they can't figure out, then we can always assist them.
Obtain Feedback for Confirmation	When discussing the project, make sure to get feedback that confirms that the delegatee understands the task.
Engage in Progress Updates	Take the time to check in on the progress of the project, especially if the project is more complex. Confirming to delegatees that we're interested in their progress gives them greater pride in the work and provides ample opportunity for ongoing feedback about the work being performed.
Debrief If Appropriate	Debrief with the delegate whenever the project merits it. *What went well? What could have gone better?* These are opportune moments to greatly improve both work product and working relationships. (Review the "Critique Productively" section earlier for more information on this activity.)

Creating a checklist in Word or Evernote to refer to when delegating a task is the best way to ensure we maximize our time and get the best results possible for the client and our team members.

2. Manage Work Flow

Managing *literally* takes time, and time is our most precious resource. Following up with others is the most delicate aspect of management.

Ensuring the timely delivery of materials is the objective of follow-up, so the most obvious starting point for discussing follow-up is the *deadline.* We don't always control the deadline. Often, we receive work from others that includes no deadline or lacks a clear deadline, such as "ASAP," "Urgent," or something similar. Our first priority here is to ascertain if there is a clearer deadline. This can be done diplomatically with superiors and clients alike via messages/e-mails, such as in the following examples:

- This looks interesting, and I understand there's time sensitivity. Can I get you something by Thursday end-of-day?
- Great project. Is this more important than the Smith deliverable you asked for earlier? I just want to organize my day to meet your needs.

Backing into the follow-up schedule begins after a clear deadline is secured. The follow-up needs to be frequent enough to ensure responsiveness but spaced out enough to allow progress to be made during the interim periods. For example, if a project is due in a week, then two follow-ups are reasonable: the third day out and the fifth day out.

Maintain a positive perspective when following up. The point is to get needed information on the task's progress, as well as to offer any assistance necessary. Short communications are best for following up:

- I'm checking in with you regarding the Smith matter. Is there anything I can do to facilitate your efforts?
- As you're aware, we have a Thursday deadline for the Smith matter. Let me know if we're still on track to make that date.

These are diplomatic but clear communications intended to check in with others, while managing work flow from day to day.

3. Conduct Productive Meetings

Meetings are the most expensive periods of time we spend together. Consequently, meetings need to be highly productive to justify the expense. Productive meetings contain the following elements.

Meeting Element	Explanation
Set an Agenda	How can meetings occur without an agenda? It's like scheduling a business trip without an itinerary! Agendas are simple to construct and distribute. The road map they provide prepares attendees for what will be covered during the meeting, and they're a terrific way to keep the meeting on track. The more specific the agenda, the better the road map, and the more likely the chance of accomplishing the stated objectives!
Make Sure There Is a Hard Start and Hard Stop	Meetings need a physical structure, which means predetermined start and end times. The old saying that "work fills the time allotted" is completely true. It's also important to state the start and end times at the *beginning* of the meeting. This serves as a reminder and sets the parameters for everyone involved.
Prepare Only Necessary Materials	A lot of work can go into preparing for a meeting, so prepare (or instruct others to prepare) only what is *truly* necessary to communicate effectively during the meeting. *One thing that should be eliminated from virtually every team meeting is PowerPoint slides!* Read that sentence again because it's important. Most people use PowerPoint to put their speaking points on the screen. *Boring!* We can read speaking points, so why are we here in a meeting? Moreover, creating a list is much easier to do in an e-mail or Word than it is in PowerPoint, and there's no setup time required to fiddle with the projector and such.
Distribute Materials in Advance	Send out materials well before the meeting—preferably, the day before the meeting—with a request that people review them and come prepared to discuss the items listed. We don't want to waste everyone's time by reading our summaries to them! We want to leverage that time for input.
	It's our job to "run" or moderate the meeting. That

Moderate the Discussion	means staying quiet most of the time and acting as a guide to keep everyone on course (topic-wise) and moving forward (productivity-wise) within the time frame allotted. Think of it as a referee or facilitator role. We want to marshal these valuable resources (people and their ideas) toward an effective end. If we, as managers, participate too much, we'll run the risk of commandeering the meeting, which is not an effective use of team members' time.
Confirm Decisions and Action Items	As the moderator, it's our responsibility to confirm out loud with everyone in attendance the decisions made, the action items determined (if any), and the people assigned to those action items. This can be reduced to a follow-up e-mail and placed on a future agenda for updates. This is a huge point of failure for many meetings—the failure to articulate decisions, action items, and attendant responsibilities. Ironically, it is generally the stated reason for meetings! Fix this hole by stating things clearly before everyone disperses.
Identify Follow-Up Expectations	The final point of any effective meeting is identifying and stating the next point of follow-up, if there is one. Place parameters around the work so people have relatively short-term goals for producing a result. Make the follow-up period reasonable within the context of the work to be performed, but make it date-certain.

Make this meeting checklist in Word or Evernote so you have it available whenever a meeting is approaching.

Running an effective team takes a lot of coordination. Managers who focus on how to delegate well, engage in diplomatic but persistent follow-up, and conduct productive meetings have a head start in getting the most from themselves and their team members.

Conclusion

The four key skills discussed in this book—Consideration, Collaboration, Communication, and Coordination—provide a functional framework for developing managerial prowess. The result is a cohesive team providing optimal work product—responsively.