Role of a Manager

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Manager Definition

Increase the output of their organizations and neighboring organizations they influence.

Manager Responsibilities

People Management

- Hire
- Serve your team
- Performance Management
- Communication Management
- Engagement
- Inter-Departmental Relationships
- Demonstrate Leadership
- Provide Feedback
- Professional Development
- Weekly One-on-One

Work Product Management

- Work Product Feedback
- Management Work Review
- Escalation Point for Directs

Operations Management

- Team Meetings
- Process Management
- Enablement
- Workload Management
- Reporting and Auditing
- One-Off Activities

People Management

Hire

Finding the right talent that matches our values and mission statement is a big part of a healthy organization.

Expectations:
- Interviews are planned so that each interviewer has a specific topic.
- Interview panel consists of representatives from key stakeholder groups.
- Questions are designed to assess fit for personality, values, job, competency, fit with management style, and ability to receive and act on feedback.
- When deciding between speed of hire and quality of hire, always choose quality of hire.
- Maintain our company's great reputation by demonstrating high degree of respect for candidates throughout the process.

Serve your Team

A set of practices that enriches the lives of individuals and ultimately builds better teams.

Expectations:
- Invite Open and Honest communication.
- Start conversations that solicit ideas on how you can help.
- Ask directs what is challenging them.
- Get the team what they need to make them successful.
- Give them visibility, share our mission and values and how they fit in.
- Take an interest in them.

Manage Performance

Employees that repeatedly exceed expectations need to be recognized and promoted while those who fall short of expectations must improve or exit the business.

Expectations:
- Provide regular cadence of feedback on overall performance.
- For Directs falling short of expectations, ensure this is communicated clearly and reflected in Professional Development Plan.
- For Directs that repeatedly fail at improving, create a Performance Improvement Plan (PIP).
- Directs that fail expectations in 2 consecutive quarters require a PIP (if not less time).
- For all Directs, create goals in Professional Development Plan that focus on skills necessary for growth.
- Directs Exceeding Expectations for an extended period of time should be considered for advancement and constantly monitored to ensure continued high engagement

Communication Management

Managers are conduits of communication both to their employees (down), to their managers (up), and with peers (across).

Expectations:
- Plan and execute effective team meetings/scrums to foster team communication.
- Deliver and reinforce company messages thoughtfully to your team by providing context and how it applies to them.
- Summarize important meeting outcomes to your manager.
- Drive performance and unity. Be aware of conversations circulating among Directs.

Engagement

Managers are the most important factor in determining employee engagement.

Expectations:

- Represent the company and department goals in the best light.
- Check in on morale.
- Be aware of and address any potential burnout situations.
- Observe if directs are coming to you when they need help.
- Help the direct by contributing to solving any engagement related problems. Add your experience to guide the direct and provide direction.
- Deliver and Support information that may affect engagement with accountability and transparency.
- Give the team the "why" of unpopular decisions.

Inter-Departmental Relationships

Good relationships to other internal teams make work happen more effectively and improve our customer experience.

Expectations:

- Create and manage effective relationships within your peers.
- Create and manage effective relationships with managers in key internal groups.
- Communicate the results of these interactions upwards and throughout Customer Success.

Demonstrate Leadership

Leadership gives the direct a vision for the future and connects their contributions to the big picture. Employees that are connected to the vision and understand the greater impact of their contributions are more engaged.

Expectations:

- Connects directs day-to-day contributions with higher company goals.
- Encourage open and creative thinking to solve big problems or create new opportunities.
- Identify and share with your manager where there are gaps to drive continual improvement.
- Inspire your team.

Provide Feedback

Be aware of behaviors and interactions to provide positive and corrective feedback. As examples, how a direct interacts with peers, events outside of work that may impact work directly or indirectly, proper time management.

Expectations:

- Be involved in direct's day-to-day so you have the opportunity to observe behaviors and interactions
- Provide recognition for positive behavior accordingly
- Provide corrective feedback when direct does not meet expectations
- Feed outcomes of positive and corrective feedback into Professional Development conversations and goals

Professional Development

Helping the employee grow and develop to be an amazing talent regardless of the specific job function.

Expectations:
- Each direct has a Professional Development Plan using a goal framework that is agreed upon and updated quarterly via 4x4's based on People Management Feedback and Work Product Feedback.
- Help the direct create, update, and execute on a professional development plan by being an escalation point and by providing real time feedback on successes and areas of improvement.
- Support the direct by coaching and connecting opportunities.
- Set a checkpoint for professional development monthly.

Weekly One on One

A weekly meeting with IC (individual contributor) is key to developing and maintaining the relationship with a direct.

Expectations:

- This is primarily driven by IC.
- One on ones held weekly (30 minutes).
- Gain understanding of what is happening in the direct's day-to-day
- Determine where direct requires manager support and attention
- Discuss professional development and expectations with direct (monthly)
- Request and deliver bi-directional feedback
- Discuss PTO and other requests (when applicable)

Work Product Management

Work Product Feedback

Everyone can improve. Managers must provide work product feedback to help identify areas of excellence as well as areas of improvement to enable changes necessary for improvement to occur.

Expectations:

- Meet weekly to provide feedback (30 minutes).
- Provide actionable feedback based on work product review and on-demand assistance.
- Share with Direct and document outcomes of positive and corrective feedback into Professional Development Plan and goals.
- Determine where Direct requires manager support and attention.
- Actively touch base with Direct on a just in time basis to ensure work is progressing in accordance with goals.
- Ensure work is reallocated throughout the team when people are on PTO.

Management Work Review

Being aware of what is happening with our customers and work we are doing for them is key to success for our team.

Expectations:

- Ensures each Direct's reports are healthy: they have the correct amount of work assigned, and are completing the work as expected.
- Review 5-10% of specific details of the work: tasks, communication, code, etc.
- If customer facing, pay close attention to all customer interaction to ensure adherence to core values.
- Ensures productivity goals are set and all commitments (both inside and outside of work) are met.
- General knowledge of work in progress where directs need assistance.
- Manage work transitions to ensure work goes to different teams appropriately.
- Direct involvement and assistance in work taking that is overdue by more than x days (x is variable depending on type of work done.

Escalation Point for Direct

Expectation is that each Directs can work independently, ask peers for assistance when blocked, and then go to manager if still unable to resolve.

Expectations:
- Manager is actively soliciting and assisting Directs on work where they are "stuck" (little to no progress) to accelerate completion of work.
- When necessary, managers will ping out to other teams to move work product forward.
- Inform senior management if a blockage was due to process or personnel within or outside the support department.
- Be accountable and informed on any work going outside of SLA, or falling into an extended period to resolution.
- Report up the items that need more attention.

Operations Management

Team Meetings

The sharing of information between the Directs increases each individual's knowledge and improves their ability to proactively manage their respective work product.

Expectations:

- Total time for week should not exceed 60 minutes.
- Preferred approach is daily 10-15 minute scrum if 5 or less, or 20-30 min 2-3 times per week if larger.
- Managers defer leadership during the scrum but can choose to participate in the scrum.
- Escalate any noteworthy topics from meeting to leadership.

Process Management

Managers can improve productivity by maintaining/enforcing existing processes, ensuring processes achieve the intended results, identifying opportunities for improvement within existing processes, and identifying potential for new processes. The customer experience must always be top priority in all processes.

Expectations:
- Ensure defined processes are followed and maintained.
- Identify potential process improvements.
- Identify need for new processes that need to be created to improve customer experience, consistency, or efficiency.

Enablement

Directs need to be trained on behavior, processes, and products to maximize productivity.

Expectations:
- Work both independently and with Enablement to ensure Directs are trained and knowledgeable on product, functional, and behavioral skills.
- Ensure new Directs complete the onboarding plan and work with enablement to help improve that process.
- Make sure that ongoing training is a part of the team's regular educational and improvement process.
- Ensure personalized training occurs that supports each Directs professional development plan and goals.
- Verify Directs proficiency of new skills.

Overall Workload Management

Managers must also be reviewing and owning the larger outcomes their team is delivering. Ensuring queues, tasks, and commitments are all meeting or exceeding expectations, and working to improve performance against today's standard.

Expectations:
- Monitor reports to ensure the team (and company) is meeting expectations.
- Escalate up any issues seen across the team that impact the company or prevent the company from improving.

Reporting and Auditing

Reporting, and continual analysis of key data is vital to running a successful team.

Expectations:

- Ensuring completion of time card, on-call, expense reports, and PTO requests from Directs.
- Creating, maintaining, reviewing, and acting upon identified team-wide reports and dashboards.
- Information rolled up to senior management.

One-off Activities

In spite of best efforts, we need to be flexible and leverage managers' skills and expertise to just get the job done.

Expectations:
- Be aware of and lean in on non-traditional management activities you are asked to perform.
- Make sure manager is aware of impact of this activity so appropriate planning/adjustments can occur.

Time Allocation

Average Time per Week for 10 Direct Reports

- Training: 2 hrs
- Prep for 1:1 and work review meeting: 1 hr per IC (10 hrs)
- One on one and Work Review Meeting: 1 hr per IC (10 hrs). This can be broken into separate meetings if Manager prefers.
- Team meetings: 1 hour
- Team meeting prep/review: 1 hour
- Escalation point of contact: 2 hours daily (10 hours)
- Boss 1:1: 1 hr
- Project Work: 4 hrs
- Interdepartmental activities: 3 hrs

TOTAL: 43 hours