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# PART I

## THE TRUTH ABOUT ASSUMING A LEADERSHIP POSITION

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# TRUTH 1

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## MORE-RESPONSIBLE ROLES REQUIRE MORE MENTAL “BANDWIDTH”

Leadership is a complex mix of responsibilities and accountabilities. To lead effectively, you need to be able to process large amounts of information quickly and handle multiple tasks at once. In computer terms, you need a lot of “bandwidth.”

As you move up in leadership, you may start to feel that your processing speed is slowing down. The greater demands of a new position can expose areas in which your skills are not fully developed. This is not a cause for alarm, but a positive leadership challenge. The trick is to address those areas immediately, before they steal too much mental bandwidth from other vital parts of your job.

The following seven areas require your constant attention:

1. **Your personal work habits**, including keeping track of requests and commitments at meetings, your schedule, and follow-up with your team and others.
2. **Your personal mood and stress management**. Your moods affect many other people once you are in a senior position. As a leader, you need to do whatever it takes to respond with objectivity to the many demands on your

time and judgment so that your stress doesn't spread across the organization.

3. **Your leadership infrastructure and systems**, which include how you deal with your budget(s); your support staff; your organization's support functions, such as finance, human resources, and IT; and your organization's operations functions, such as sales, marketing, and manufacturing.

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4. **Your vision and strategy.**

These need to be developed over time so that they have the clarity and richness that stimulate others to move in the right direction. Whereas management is about avoiding the problems you encounter en route, leadership requires you to chart a string path forward for others.

5. **Your relationships with your leadership team**

**members.** Good working relationships are the most effective way for you to implement your leadership agenda.

6. **Your relationships with peers and colleagues.** These impact upon the goodwill and trust that are vital for effective working. Cross the white space on your organization chart by connecting with others and keeping them informed.

7. **Your relationship with your boss**, whether a board, a matrix of bosses, or just one, is crucial to your success. (But no more so than any of the other areas, so beware of the temptation to attend to your boss(es) before all else!)

Inability to focus at meetings, getting easily frustrated, not attending to important follow-up, and ignoring key players are all signs that you're overwhelmed by your job, and that your bandwidth needs attention.

The easiest way to broaden your bandwidth is to strengthen your support systems. Can you designate someone as your second-in-command? Having such a person, known colloquially as your "2IC," is not only important for you but also a great learning opportunity for a direct report.

But don't make the same mistake as the leader who selected a business manager several rungs below him. The manager wound up filling in for his boss in situations that were way over his head, with negative consequences. It's vital for your own credibility that the people you use are right for their positions.

Remember that all areas of your leadership role need your attention. Neglected areas will inevitably trip you up when the demands of your new role put your bandwidth to the test.



# TRUTH 2

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## INHERITING AN ASSISTANT REQUIRES REEDUCATION

If you inherit an assistant from your predecessor, you have to tread carefully in establishing this important relationship.

It is a mistake to underestimate your assistant or secretary's loyalty to the previous incumbent in your job—and to what he or she believes the company is or should be—as compared to his or her initial loyalty to you. You might think you “butter your assistant's bread,” but you are the newcomer. In a sense, you are part of a “hostile takeover,” since your assistant probably did not have a say in your taking over the role. If you don't concentrate on the relationship early on, you will be in trouble.

But if you get your assistant on your side, he or she will be your biggest support in a crunch. Your assistant can run interference for you and be in the “end zone” when needed. So, deal with your assistant first and in a different way from how you deal with the rest of your team.

How you deal with your assistant will vary depending on your style, his or her style, and which scenario you're faced with when starting the job. Here are three scenarios that the new relationship may present to you:

1. **When you come into the job, your assistant is already on your side and supports you completely, since “the boss is the boss.”** Convincing is not the problem; rewarding is the way you need to think. If you don't notice and thank your assistant, he or she may not stay on your side for long. If you don't offer rewards like a bonus, flowers, lunch, working to get rid of jobs the person doesn't want, the relationship is one-sided and thus unstable.
2. **Your assistant is suspicious of you and waits to see who you are and how you treat people.** You're being tested. You'll recognize this situation when your assistant's behavior seems inconsistent. Sometimes you'll think your assistant is on your side, and other times you'll wonder why you were left out to dry instead of being given a heads-up on something. You need to reward your assistant when he or she is there for you and especially for giving you warnings and guidance. When your assistant fails to meet your expectations, express your disappointment and ask for a different set of behaviors in the future. The key is that once you have asked for the new behavior, you need to move on and not dwell on it so that you re-educate rather than reject as you keep the air clear.

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- 3. You find yourself with someone who has a limited view of the job, its relationship to you, the role that he or she has in giving you fair warnings, and the loyalty required in the way you are talked about.** In this case, you need to take more serious action. If you have repeatedly asked your assistant to leave 20 minutes between appointments so that you can regroup and prepare, but he or she consistently does not do so, several things may be happening. It might be better if he receives your instructions in writing. She may be pressured from the outside to schedule your time to meet other people's needs. He may only do things the way he's always done them and can only stay in a groove. She may be undermining you. For the last two, you have to deal with facts, not feelings. How frequently and to what degree does your assistant not follow directions? In an objective and unemotional way, you need to lay out the facts as you see them, along with your expectations and requirements. And you need to do this as a time-out rather than in ongoing coaching.

It's vital that you understand what your assistant is doing. Don't just get angry because he or she is not doing things the way you want. The key is to be objective, since most people fluctuate in their skills and commitment. If you find yourself with someone who believes there are areas that are "not my job," you need hard facts about what happened to ensure your objectivity.

## The Truth About Being a Leader

The relationship with your assistant is important. Paying attention to that relationship early on increases the effectiveness and efficiency of your working together. If you find that it's not working because you have someone stuck in a groove who can't adjust, you should think about getting someone in the job who can work with you.



# TRUTH 3

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## STAFFING YOUR LEADERSHIP OFFICE: YOUR ASSISTANT PLAYS A VITAL ROLE

**M**any of the people you'll deal with as a leader start forming their opinions of you long before you meet them—when they first call or visit your office and encounter your assistant. This person serves as an advertisement for who you are in your organization. If he or she is kind and gracious yet sets good boundaries, others will see professionalism.

Therefore, hiring the right assistant should be a top priority as you enter your leadership role, and the process needs your personal attention. It's a big mistake to leave the selection of such a key person to your office manager or someone in human resources. Others can help screen and process candidates, but it's your job to get your requirements straight and to conduct the final interviews.

Why is it worth taking the time to do this? Aren't all good assistants the same? No! Different people need different assistants!

Think about what you'd like—and we're not talking looks, age, or other vital statistics. Brainstorm a list of requirements, and put them in writing. Include the few characteristics that are required, the many that you would like to have, and the

ones that you know will not work. Do you want someone who instantly responds to any request from senior executives, or do you need someone who talks with you each day and thinks through your requirements so that a senior executive request may get a bit of postponement? These are both valid approaches, yet are different ways of working.

Some common requirements may include hiring someone who

- Knows when to contact you when you are on the road.
- Screens your calls.
- Knows how to take into account your work pace and preferences when scheduling your diary.
- Shows loyalty by speaking well of you and keeping a professional distance with other colleagues and staff members.
- Thinks ahead to anticipate what you need.
- Checks for unforeseen problems that can result from everyday decisions.
- Is well connected in the company or can make connections quickly.

Once you've established your requirements, send your wish list to the HR team. Then choose the most qualified of the candidates they choose for interviews. And don't forget internal candidates so that you are fair and can compare.

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Now think through your interview approach. How will you confirm candidates' abilities and make sure that their mind-sets match what you require for the job? The interview process may be dictated by the norms in your company, but it's your responsibility to get what you think you need.

The following techniques are all proven ways of drawing out a candidate's abilities. Use them individually, or combine them for really incisive interviews.

1. Ask candidates to **talk about what they did in every job they have had since school or at least in the last two to four positions. What did they enjoy most, and which areas were not so enjoyable? What were they good at?**

What they enjoyed is a key to where their strengths lie. This helps you determine whether they have had experiences that will be useful in working with you.

2. As candidates talk about the positions they've held, ask **what they thought of previous bosses' strengths and weaknesses** (one or two of each will do). You're not asking them to be disloyal but to look at each boss objectively, since everyone has strengths and weaknesses. You're looking for what may apply to you. If you want someone who can think for himself, it should sound alarm bells if he says his former boss's strength was that she told him exactly what to do. If someone tells you that her boss gave her a lot of praise, do you want to do that consistently?
3. **Ask about hypothetical situations** based on your wish-list requirements. Is there something special about the job

you need done regularly? If so, compose a test situation. If you want to find out if someone can handle ambiguous scheduling requirements, pose a hypothetical situation: "What would you do if I were out of town and someone insisted on making an appointment for when I got back?"

4. **Acknowledging expectations.** Tell the candidates your expectations, and ask them to give you theirs. These expectations are good clues as to what they want in a job and whether they match your requirements.

Getting the right person to represent you to the world and to be a partner in your day-to-day work life can make or break your success in your leadership role. Taking the time to identify, check out, and hire that person is worth every hour and day you devote to the task. You will reap the benefits.



# TRUTH 4

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## THE GAPS IN YOUR WORK HABITS SHOW UP WHEN YOU MOVE UP

**M**oving into leadership is like moving up in school. No matter how smart and motivated you are, if you don't know how to organize yourself, the complexity of your new environment will overwhelm you.

You probably advanced because you were the best at what you did. But what got you to where you are may not work anymore. In the past, you may have been able to “wing it” by relying on your wits, but the higher you go on the organizational chart, the more complicated things get.

George unexpectedly moved up from managing 12 salesmen to leading all his company's sales and marketing employees. A smart and enthusiastic leader, he found that he could no longer do what he used to do, which was drift around his department as he cajoled, praised, and pumped up his 12 people. Now he had 29 direct reports and a total of 400 people reporting to him. The little things he used to do, like going out with some of his team members for happy hour, didn't go down well with his new team.

Your new leadership position will require you to hone your **personal work habits**:

- **Keep up with scheduling.** Ensure that you or someone who works for you puts every appointment and meeting on your calendar and that you show up on time.
- **Delegate using quality standards and due dates.** Give your staff enough guidance and time to get their work done, and then hold them to their deadlines.
- **Follow up on delegation and commitments.** Have your assistant keep a follow-up file so that you are on top of all delegated assignments.
- **Make decision-making clear.** Let others know if your decisions include them and whether they have input into your decisions. Also let them know when a decision is theirs to make.
- **Follow the money.** Have someone keep track of budget figures and expenditures on a monthly basis and balance the inflow and outflow.
- **Ensure fairness in all you say and do.** Use checklists to keep track of which staff members you compliment or coach so that you don't inadvertently ignore some of them.

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- **Let go of being one of the guys.** Find leader-like and appropriate ways to interact in your new role. Spend time with your team and colleagues at meetings and meals. You need to forge a new way of working with others that is based on your leadership status, and sometimes that means maintaining some distance from your group.

Unless you invest enough time and thought into setting up effective working systems and relationships early on, you will get into bad habits and will never be able to advance very far. You'll get overwhelmed, like George, by the complexity, the meetings, and your inability to control the details you used to attend to. And the better you were at doing your job before, the more frustrated you will be about not being able to do what you used to do. Moving up as a leader involves a lot of letting go while still guiding others with interest and support. The sooner you stop doing parts of your old job and embrace the complexity of your new job, the more effective you will become.

# TRUTH 5

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## A RESOURCE-BASED VIEW OF YOUR ORGANIZATION GOES BEYOND THE NUMBERS

**K**eeping an eye on resources is essential to managing any organization, even a household. Yet some people are still surprised to suddenly find that their cupboards are bare or their bank accounts have no money because they haven't been watching the inflow and outflow of their resources.

When you move into a new leadership position, you naturally think to check on your organization's tangible resources: financials like revenues and costs, factories, buildings, equipment, systems, inventory, patents, and land. But it is also vital to realize that less-obvious resources like customers, learning, staff, innovation, capacity, inventory control, and morale can make or break your organization's success.

Think of each resource as a bathtub with two valves—one bringing in the elements of that resource, and one draining them. If the resource is staff, the in-valve is regular hiring, and the out-valve is staff leaving. If you don't pay attention to hiring and focused career development, you may find yourself with a depleted resource of good staff.

If you're developing more business, or new kinds of business, looking at the bathtub called staff forces you to consider how much inflow you need to be ready to staff new areas as they come up. Even if times are tough, it's best to make sure your important resources don't drain away to a critical level. It is a common mistake not to hire new people when you have a bad year or are short of funds. In cyclical industries like the oil business that have boom and bust cycles, when a downturn is over it becomes almost impossible to find people to staff the emerging boom.

Thinking of your resources as bathtubs helps you see that resources move in and out all the time. So you need to keep an eye on the level in every one of your tubs and ensure that you're putting enough into each of them.

How do you identify all your bathtubs (resources)? You can get your team together, perhaps with some outside players like customers, consultants, and your board, to determine what makes your organization special. Open your thinking to the

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less-tangible resources as well as the obvious ones. For instance, you might not think of morale as a resource. Or brand. You might need to have a brainstorming exercise to determine what all your tubs are—all the things that make your organization what it is. These might include the people, the location, the value proposition of the product or

service offered, and the advertising. Then determine what causes inflow and outflow for each resource.

For the resources of customers and learning, the tubs might look like this:

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<b>Customers</b>	
<b>Inflow</b>	<b>Outflow</b>
Potential customers	Dissatisfied customers
Rivals' customers	Customers attracted to another organization
Newly attracted customers	Attracted customers who don't then use products or services

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<b>Learning</b>	
<b>Inflow</b>	<b>Outflow</b>
Training and development	Haphazard learning
Knowledge management	Lack of knowledge management
Hiring experienced personnel	Loss of key personnel

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One important bathtub is reputation. Reputations can't be measured in numbers, but you certainly know if you have a good or bad one. When you realize that your reputation has drained below the "good" line, you can work on it. But first you have to realize this!

In gauging the levels of each of your tubs, you need to do fact-finding. Otherwise, you're using the intuition and feelings

of just a few people. For instance, you can check on morale by doing a climate survey or check on customer attitudes with focus groups. Getting solid information from surveys and staff readiness reports from your leaders gives you a foundation for your decisions about where to support designated resources.

Taking a real resource-based view, rather than just getting a few facts and figures, is important. It's also tricky, because a lot of these things can't be measured in a bean-counting way. But, as with a bath, you don't have to count the gallons of water. What's important is whether your tub is comfortably full or worryingly empty.