

Dattner Consulting, LLC

Writing your managerial user's manual

User's Manual

- **Definition**
- **Why a user's manual is helpful**
- **How to write your user's manual**
- **Components of your user's manual:**
 - **Motivation**
 - **Work style**
 - **Management and delegation style**
 - **Communication and feedback style**
 - **Learning and decision making style**
 - **Values**
 - **Personal style and other**
- **Recommendations**
- **Sample User's Manual**

Definition

- **Definition**
- **Why a user's manual is helpful**
- **How to write a user's manual**
- **Components of a user's manual**
 - **Motivation**
 - **Work style**
 - **Management and delegation**
 - **Communication and feedback**
 - **Learning and decision making**
 - **Values**
 - **Personal style and other**
- **Recommendations**
- **Sample User's Manual**

A user's manual is a clear and concise document that communicates to others one's motivations, work style, management and delegation style, communication and feedback style, learning and decision making style, values, personal style, and any other information that can help reduce misunderstandings, accelerate mutual understanding and facilitate better collaboration

This presentation was inspired by an article in the *Wall Street Journal* titled: "Job Candidates Get a Manual From Boss: 'How to Handle Me' " by Joann Lublin, which was published on January 7, 2003, citing the work of Laurence Stybel, co-founder of Stybel Peabody & Lincolnshire

Why a user's manual is helpful

- The quality of working relationships is one of the biggest determinants of job satisfaction, if not the biggest determinant
- It takes an estimated 6 months for people to develop comfortable working relationships with their co-workers and even longer to develop comfortable working relationships with their bosses
- During the first 6 months there is a high risk of preventable misunderstandings leading to resentment and mistrust. Even after the first 6 months there is still a high incidence of preventable communication breakdowns
- Writing a user's manual not only accelerates the getting-to-know one other process, it also sets a positive precedent for open dialogue and a framework for ongoing clear and candid communication
- Most managers welcome the opportunity to write a user's manual, and their staffs find it a very useful tool

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

How to write a user's manual

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

- Review past performance reviews and/or 360 degree feedback
- Consult trusted current or past colleagues for input
- Take assessment tests such as the MBTI or the Hogan
- Consider strengths, development needs, and hoped-for changes
- Create a first draft and then ask for feedback and suggestions
- Check in periodically to ensure accuracy, relevance and usefulness

Components of a user's manual

- **Motivation**
- **Work style**
- **Management and delegation**
- **Communication and feedback**
- **Learning and decision making**
- **Values**
- **Personal style and other**

- **Definition**
- **Why a user's manual is helpful**
- **How to write a user's manual**
- **Components of a user's manual**
 - **Motivation**
 - **Work style**
 - **Management and delegation**
 - **Communication and feedback**
 - **Learning and decision making**
 - **Values**
 - **Personal style and other**
- **Recommendations**
- **Sample User's Manual**

Motivation

- What motivates you

Description: I am a fanatic about continuous improvement and am happiest when I am working with people who are similarly motivated

Suggestion: it's important that you consistently demonstrate dissatisfaction with the status quo in everything you do

- What demotivates you

Description: I get frustrated when people ask me to attend meetings where my presence isn't necessary and where I can't add value

Suggestion: Consider why, when and how I can be most helpful to you and only involve me when necessary

- How you try to motivate others

Description: I sometimes make the mistake of assuming that others are motivated by the same things, at the same time, and in the same way, as me

Suggestion: Let me know what motivates you

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

Work style

- How you like to work

Description: I like to get things far done in advance in order to avoid the stress of deadlines

Suggestion: When preparing things for me, don't leave things until the last minute, even if you can pull it off at the last minute, it makes me nervous

- How you don't like to work

Description: I don't like to be interrupted when I'm in the middle of something

Suggestion: In order to get my full attention, schedule a meeting

- How you like others to work

Description: I like others to be proactive in problem solving

Suggestion: Don't present problems to me without also suggesting potential solutions

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

Management and delegation

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

- How you like to manage and delegate

Description: I like to specify goals, but try not to specify how to get there

Suggestion: Let me know that you have fully understood what I'm looking for by articulating it back to me

- How you don't like to manage and delegate

Description: I have a tendency to do things myself instead of delegating

Suggestion: Be proactive about suggesting things that you can take off of my plate, and I will be most appreciative

Communication and feedback

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - **Communication and feedback**
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

- How you like to communicate and give feedback

Description: I like to be kept in the loop, and really dislike surprises

Suggestion: Err on the side of over-communicating with me rather than under-communicating

- How you don't like to communicate and give feedback

Description: I don't give that much positive feedback, but if I have a concern about what you are doing or how you are doing it, I will let you know

Suggestion: Don't be disappointed if I don't give you frequent praise and don't hesitate to ask me for suggestions for improvements

Learning and decision making

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
- Sample User's Manual

- How you like to learn and make decisions

Description: I ask a lot of questions, and it doesn't mean I'm skeptical, just curious

Suggestion: Learn to anticipate the questions I might ask so that you can prepare in advance and we can get more done when we meet

- How you don't like to learn and make decisions

Description: I don't like to be rushed in making decisions before I understand the context for a decision

Suggestion: Send me data, even if it is incomplete or unconfirmed, as soon as it's available so that I can begin to get a picture of what's going on

Values

- What your values are

Description: I take the company's values very seriously, and insist that everything we do conforms both to the letter and the spirit of our values

Suggestion: Don't present any ideas that conflict with our company values, even ideas that might appear on their surface to conflict with our values

- What your values are not

Description: I don't believe in sacrificing the trust of our customers even if it will be expensive to not do so

Suggestion: Looks far into the future for issues that may emerge that might make it challenging for us to meet customer expectations

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
- Values
 - Personal style and other
- Recommendations
- Sample User's Manual

Personal style and other

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
- Personal style and other
- Recommendations
- Sample User's Manual

- How you would describe your personal style

Description: I strive to be friendly, but get very focused on the work at hand and may cut short small talk

Suggestion: In order to have less formal or focused interaction, I encourage you to put a lunch on my calendar once a quarter

- How you would not describe your personal style

Description: I don't mind being interrupted any time if you have a personal crisis that I can help out with in any way

Suggestion: Count on my full support if you have a personal or family issue, and don't hesitate to bring it up any time, no matter what else is going on

Recommendations

- A user's manual should be an evolving, living document and should be updated every year or two
- Managers and executives should solicit ongoing feedback from staff and colleagues about how accurate and useful their user's manual is
- A user's manual should be used for the multiple purposes of developing managerial self-awareness, reducing the likelihood of miscommunication, and providing a framework for discussions about improving collaboration
- A user's manual should provide explanations and suggestions, not rationalizations or justifications
- A user's manual should be a supplement to candid and constructive conversations, not a substitute

- Definition
- Why a user's manual is helpful
- How to write a user's manual
- Components of a user's manual
 - Motivation
 - Work style
 - Management and delegation
 - Communication and feedback
 - Learning and decision making
 - Values
 - Personal style and other
- Recommendations
 - Sample User's Manual

Forewarned Is Forearmed

Give your staff a user's manual—to you

By Ben Dattner



Your iPhone has one. So should you. If you're a boss beginning a new job, providing detailed instructions to your new staff about how you operate can help prevent communication breakdowns and misunderstandings. In your "Managerial User's Manual," which you write for yourself and then share verbally with your new team, you can describe your preferences, your style, what makes you apoplectic, and what people may not understand about you. After all, most bosses would claim, "Hey, I'm not toxic, just misunderstood."

A user's manual provides the foundation for constructive conversations about your motivations, work style, management and delegation style, communication and feedback style, learning and decision-making style, values, personal style, and any other information that can help reduce misunderstandings, accelerate mutual understanding and facilitate better collaboration with your new team.

The benefit of a user's manual is that it serves as a starting point for accelerating the "getting to know you" process. Writing a User's Manual greatly diminishes the possibility that misunderstandings will cause your new team to view you as a "toxic" boss. (It can also defuse tensions between longtime leaders and their staffers). The content of a user's manual should include what one values, what one is motivated by, and areas for potential miscommunications. In a sense, any interaction between a new leader and his or her team can be thought of as a cross-cultural communication. After all, the new leader comes from another organizational culture, and possibly also a different national culture as well.

For example, a client of mine wrote a user's manual in which he let his team know that just because he asks many questions, it doesn't mean that he is skeptical about their capabilities. It's simply his modus operandi. Originally a New Yorker, and now a company president in Mexico, my client was mindful that his new team might misinterpret his candid style as confrontational. A British HR Director working in New York City told her staff that they shouldn't interpret her reserved demeanor as being distant or unfriendly.

In order to create a User's Manual, you can review past performance reviews and/or 360 degree feedback, consult trusted current or past colleagues, mentors or coaches for input, or take assessment tests such as the Myers-Briggs Type Indicator (MBTI) or the Hogan Personality Inventory.

By writing a “user’s manual” in which one conveys valuable information about oneself, the risk that negative interactions will occur can be greatly reduced. For example, another client wrote in his user’s manual that he was a morning person, and he requested that his new team approach him with issues in the morning rather than in the afternoon. If he had not conveyed that preference, his staff might have approached him in the afternoon and concluded that he did not really want to interact. Or that he didn’t care about the issues that they were trying to bring to his attention. In other words, they might have perceived his afternoon disengagement as being due to toxic disinterest instead of circadian rhythms.

With many people in career transition these days due to the challenging economy, writing a user’s manual can be a good use of time, not just because when one finds one’s next job the user’s manual can be a useful tool, but also because even in the interviewing process, taking time to reflect on one’s style and preferences can make it easier to prepare for interviews in which prospective employers may assess self awareness and potential leadership skills. Whenever I interview job candidates on behalf of clients, I ask them what wisdom they would share with their prospective new staff.

Writing a user’s manual not only accelerates the getting-to-know one other process, it also sets a positive precedent for open dialogue and a framework for ongoing clear and candid communication with your new staff. A user’s manual should provide explanations and suggestions, not rationalizations or justifications, should be a supplement to candid and open conversations, not a substitute for them, and should prevent the kinds of misunderstandings that can lead a new leader to be viewed as toxic.

A user’s manual should be an evolving, living document; managers and executives should solicit ongoing feedback from staff and colleagues about how accurate and useful their user’s manual is, and should update it as they progress in their careers. Leaders should also endeavor to build on their strengths and remedy their development areas on an ongoing basis, so that both their user interface and their operating system improve over time. Used intelligently, a user’s manual can be an invaluable antidote against toxicity.

Sample User's Manual

- My style: Be ready to answer the question "why" five times for any given issue. If I ask a lot of questions, don't be worried or defensive, that is my style
- My style: I get right to the point, don't take it personally, and I prefer when others do the same
- My style: I have a unique sense of humor, don't take everything I say so seriously. If you have a good sense of humor, it will be much easier for you to work with me
- My style: When I am under pressure, I get serious. This does not mean I am angry
- My style: If you have an important issue to discuss, schedule a time and book a conference room to make sure I can give it my full attention
- Values: Don't make short term suggestions that ignore the long term or systemic implications or that are not strategically aligned with our principles
- Values: Don't ever waste my time with suggestions that violate our company's principles
- Values: I treat the company's money as if it were my own, you should too
- Values: It is very important to me that I and everyone else in this organization treats people with equal respect and dignity
-

Sample User's Manual (continued)

- What I like: Have conviction for your point of view, and push back on me. If you are not convinced or prepared, don't bother presenting something to me until you are
- What I like: I respect people who call me on my b.s.
- What I like: I value out of the box thinking, but you should always include the value to the business and the customer of what you are proposing
- What I don't like: Don't present problems without also suggesting solutions
- What I don't like: I am very unforgiving of people who don't admit or who cover up mistakes
- What I don't like: I hate surprises. Err on the side of over communicating with me
- What may be Misunderstood: I don't give much positive feedback. If I'm dissatisfied, I will let you know. Assume I'm satisfied with your work unless I tell you otherwise
- Work-life balance: When people need my support for business, personal and family issues, they can always count on it

Ben Dattner, Ph.D.

ben@dattnerconsulting.com

1-212-501-8945

www.dattnerconsulting.com