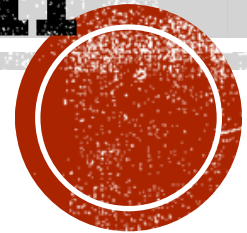
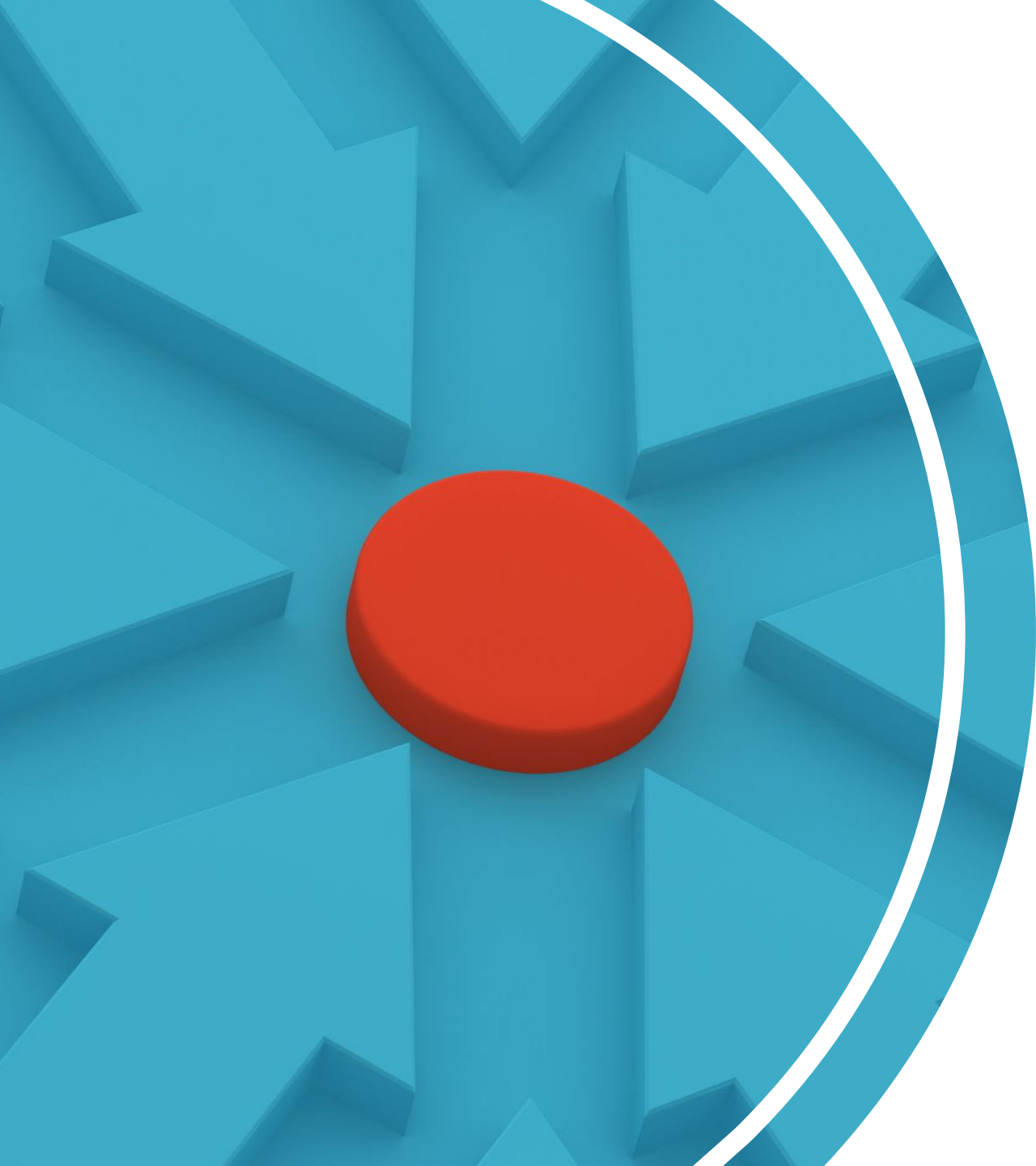


BEST PRACTICES FOR EFFECTIVE LEADERSHIP

July 9, 2026

Monique Roy





FROM PEER TO LEADER





Understanding your role as a leader

High-Level Responsibilities of Managers

- Support, guide, develop, coach, motivate, and reward colleagues
- Create goals, set performance standards, and measure progress
- Coordinate projects, resources, and timelines
- Establish team roles and delegate tasks
- Create team systems, tools, and processes
- Remove roadblocks and bottlenecks for your team
- Facilitate effective communication between colleagues
- Review your team's work and provide both redirecting and reinforcing feedback
- Serve as a liaison between upper management and your team
- Manage and maximize team performance
- Create a respectful, safe environment





The true value of a leader is not measured by the work they do. A leader's true value is measured by the work they inspire others to do.

Simon Sinek

quote fancy

The biggest shift you'll notice as you transition from individual contributor to leader is that you are no longer merely responsible for your *own* development and performance. You're now responsible for the development and performance of your entire *team*. If your team is not meeting their performance goals, then *you* will be held accountable.

That means you'll need to zoom out, see how your team's goals support greater organizational goals, and then support your team with the systems, tools, processes, and skills they need to succeed.



Imagine this...Marla was the star performer on her engineering team. For the past two years, she's excelled as an expert in her role, and she's proven her ability to execute tasks and produce exceptional results.

Marla's team could rely on her to answer tough questions or solve complex problems. It was no surprise, then, when Marla was promoted to team manager for a new business initiative.

Let's look at Marla's expectations vs the reality of being in a leadership role



Insight 2

Skills

Expectation: Marla has always excelled in her role as an engineer. She was confident that she'd have no problems stepping up in a leadership capacity.

Reality: Marla quickly realized that being an expert in her field and being a manager of people are not the same thing. There was definitely a learning curve in figuring out how to motivate others, how to get things done through others, and how to effectively navigate the interpersonal issues that sometimes arise.



Insight 1

Control and Independence

Expectation: First, Marla expected to have even *more* control and independence than she did in her previous role. Part of the allure of being a manager was that she could now be her own boss and set her own rules.

Reality: In some ways, Marla does have more autonomy over how she and her team produce results. In other ways, Marla discovered that she actually feels *less* control and independence as a manager. Not only does her team rely on her more for guidance and problem-solving, but Marla must also report to upper management about her team's performance.



Insight 3

Glory

Expectation: Marla was used to getting credit and being recognized for her achievements and contributions on her team. Being a manager seemed to promise an even greater sense of recognition and accomplishment.

Reality: Management has been a lesson in selflessness for Marla. However, by becoming a manager, Marla has also found pride and fulfillment in completely new and different ways.

For example, she now takes pride when a team member doesn't need her help. She loves to see her team members learn, grow, and advance in their careers. Like a proud parent, she lives vicariously through her team's accomplishments. She's learned to take a back seat to her team—and focus on rewarding, celebrating, and recognizing them.



WHAT DID MARLA FIND MOST CHALLENGING?

As an expert

Marla was used to relying on herself to get things done how she wanted them.

As a manager

Marla discovered that she couldn't do everything alone.

She had to learn how to communicate her vision, set clear goals and performance standards and then, hand the task or project off to her team.



ONE OF *THEM*

Last week, you were on the same level as everyone else on the team. This week, you're their new boss. To be honest, it feels a little awkward.



EMBRACE THE CHANGE-



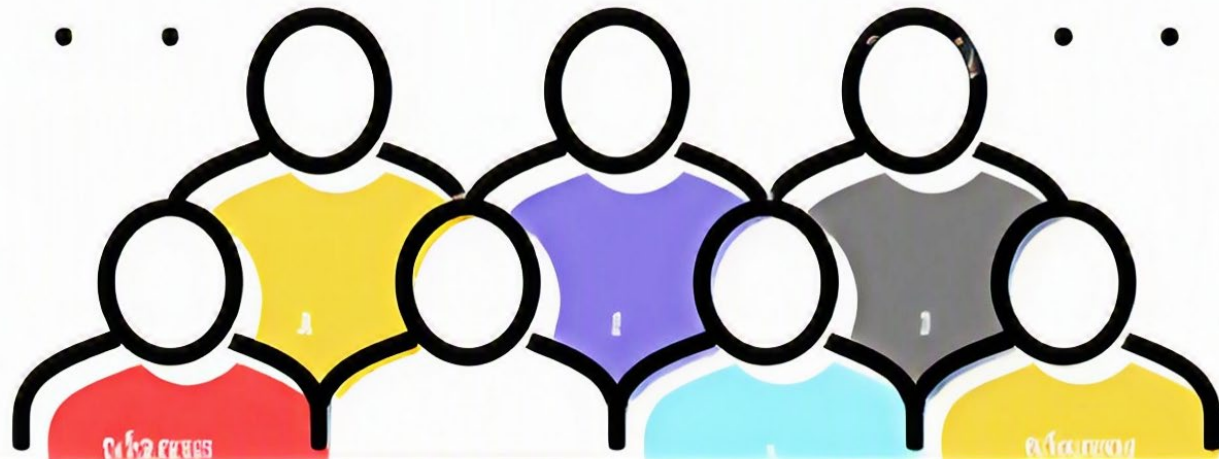
Prepare yourself
for the reality that
your relationships
and interactions
with former
peers cannot stay
the same.

- Conversations in which you may have vented, exchanged company rumors, or spoken a little too candidly with your coworkers about can no longer happen.
- Your words and behaviors will be scrutinized and looked at differently, and you must set the right example to build confidence, optimism, trust, and respect from your team.



As a leader, you can be friendly, warm, and understanding. You can care about your team and listen to them. Recalibrate your relationships with former peers and strive to be the best leader they've ever had, not the best friend.





EXPECT SOME BACKLASH

- There may be some surprising backlash. Try not to take it personally. Here are some forms of it
- Don't accept you as their manager-openly challenge your authority.
- Lack boundaries and still treat you as a friend/peer.
- Feel uncomfortable or anxious about the change.
- Badmouth you to peers.
- Don't trust your abilities or take you seriously in the leader role.
- Accuse you of being "arrogant" or "condescending" because of your new authority.
- Feel resentful or jealous of you, especially if you were competing for the same position.



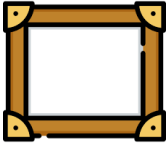
NAVIGATING THE SHIFT FROM PEER TO LEADER COMMUNICATION

Clear, honest, empathetic communication is key to preserving relationships while asserting influence and authority.

Communication strategies that can help you:



Acknowledge the shift in relationship



Frame the conversation to foster trust



Establish mutual goals for the conversation



REINTRODUCE YOURSELF



When- during 1:1 meetings

How- Share new insights about your professional values & leadership style

Talk about your vision & goals

Divulge what you're most excited about as a leader and how you plan to serve the team

Tip- *Make sure to spend at least half of the conversation asking the other person questions about what they hope to achieve, what they expect of you as a leader, how you can support them, and what ideas or feedback they have for you.*



HAVE AN HONEST CONVERSATION

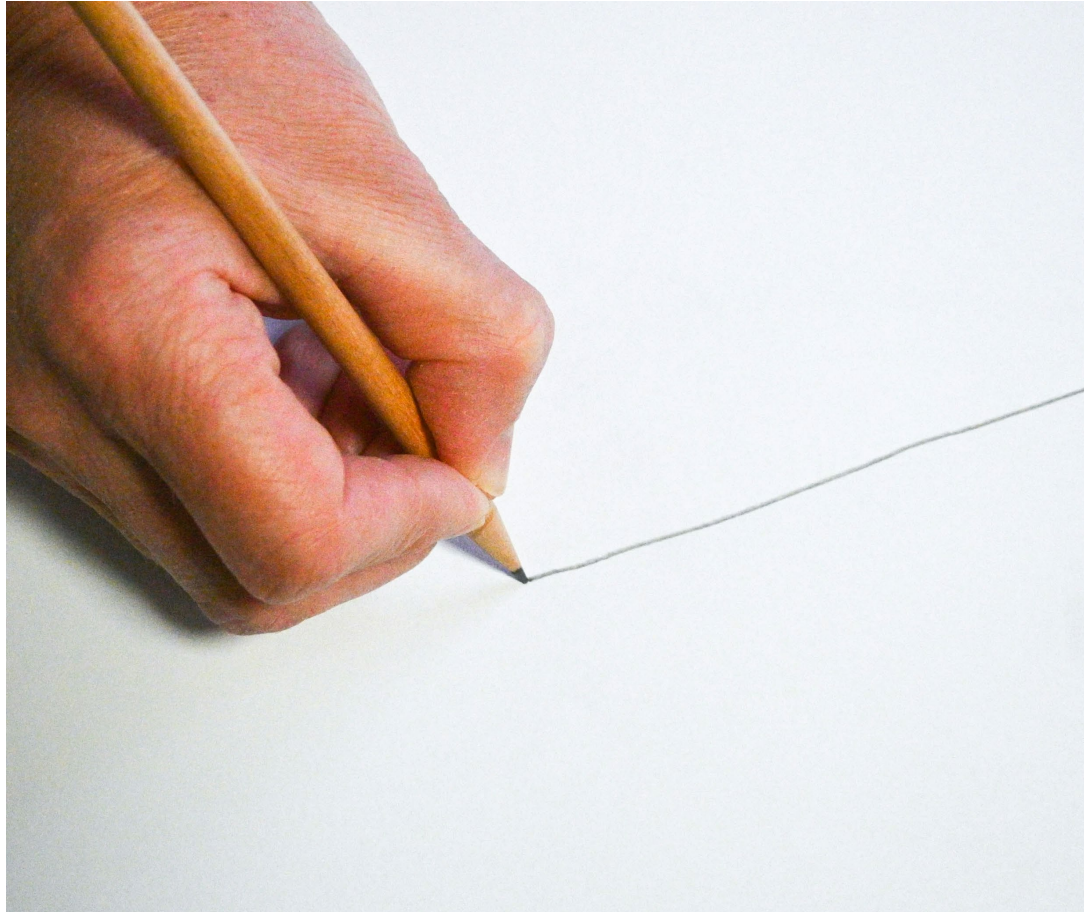
When- if you're sensing tension or awkwardness from former peers.

How- discuss how they are feeling, any concerns they have, and what you can do to make the situation more comfortable for them.

Tip- *Be upfront and manage expectations about how your relationship will change. Explain why it's important to separate your personal life and work life as a manager.*



SET BOUNDARIES



What-Taking advantage of your personal relationship and engaging in behaviors that would be considered unprofessional for a leader.

How-Paying attention to what you are saying in front of your team.

Attending fewer social gatherings (limiting alcohol).

Using professional language.

Focusing on professional conversation topics.

Tip- *Evaluate how your words and actions either help or hurt your reputation and credibility as a manager.*



TREAD LIGHTLY



Former peers will be watching you closely in your first few weeks or months as their new leader.

Avoid making sweeping changes or big overhauls to the team right away. Respect that your team will need a little bit of time to adjust by maintaining the status quo at the beginning.



COMMON MISTAKES NEW LEADERS MAKE

Even the best-intentioned leaders may struggle to learn what works for their team and fall into the same management pitfalls.





- Doing instead of delegating.
- Being a buddy instead of a leader.
- Acting unilaterally.
- Under Communicating.
- Not getting to know your team as individuals.
- Overcommitting your team.
- Losing sight of the big picture.



THE SCHEDULE CHANGE ACTIVITY

Scenario

Taylor was promoted to supervise a community health outreach team six months ago. Because childhood immunization rates were declining in several neighborhoods, leadership asked Taylor to redesign the team's outreach and scheduling process to improve access.

Wanting to move quickly, Taylor developed a new workflow over the weekend and introduced it during a brief staff meeting on Monday. Although several team members looked surprised, no one raised concerns.

Within a few weeks, experienced staff were staying late to help others adapt to the new process. One previously engaged employee became withdrawn, while another quietly returned to the old system because community partners found the new process difficult to follow.

Taylor assumed the team was simply resistant to change and focused on helping with day-to-day work rather than discussing concerns. At the same time, leadership asked the team to take on additional responsibilities related to chronic disease outreach, and Taylor agreed without consulting the staff.

Three months later, vaccination access had improved slightly, but employee morale had declined. Staff reported unclear expectations, inconsistent communication, and feeling that their feedback was not valued.

Taylor is frustrated. *"We're making progress toward our public health goals,"* Taylor tells a colleague. *"I don't understand why the team isn't more supportive."*



KEY TAKEAWAYS

Focusing on others vs yourself: Becoming a leader requires you to shift your focus to others. Ask yourself: “How can I better support my team? What does my team need to be successful?” Give your team credit and recognition where it’s due.

Delegating vs Doing: As a leader you will still have your own workload and tasks. However, management is much more focused on delegating work to others rather than just doing it all yourself. You must learn to rely on your team and give them opportunities for development. Avoid re-doing your team’s work or stepping into fix a problem yourself.

Big Picture vs Details: Also, as a manager, you’re more concerned with the “big picture” items rather than the details. Communicate project objectives, vision, and parameters to your team and then let them figure out the best way to execute your vision, giving guidance as needed.

Hard skills vs people skills: Finally, while you will use hard skills in your area of expertise to guide colleagues, management of your team will demand a much higher level of people skills. Focus on developing your skills in emotional intelligence, communication, managing expectations, and handling interpersonal issues or team dynamics.





Feedback and Documentation



[Dictionary](#)[Thesaurus](#)[Games & Quizzes](#)[Word of the Day](#)[Grammar](#)

Dictionary

Definition

[Example Sentences](#)[Word History](#)[Phrases Containing](#)[Related Articles](#)[Entries Near](#)[Show More](#)[Save Word](#)

feedback noun

feed·back 'fēd-,bak

[Synonyms of feedback](#)

- a** : the transmission of evaluative or corrective information about an action, event, or process to the original or controlling source
also : the information so transmitted
- b** : the partial reversion (see [REVERSION sense 3a](#)) of the effects of a process to its source or to a preceding stage
- 2** : the return to the input of a part of the output of a machine, system, or process (as for producing changes in an electronic circuit that improve performance or in an automatic control device that provide self-corrective action)
- 3** : a rumbling, whining, or whistling sound resulting from an amplified or broadcast signal (such as music or speech) that has been returned as input and retransmitted



FEEDBACK IS ALSO...

A dialogue between colleagues about behaviors or performance that affects results, process, or professional relationships, and it can be shared or received in all directions.



WHAT FEEDBACK IS NOT.....



THE BENEFITS OF PROVIDING REGULAR FEEDBACK



Enhances performance- Without feedback, staff may struggle to understand what they're doing right or wrong. They may unintentionally stop behaviors that are beneficial while also remaining oblivious to actions that need improvement.



Boosts motivation- When feedback reinforces positive performance, employees feel appreciated and confident, which motivates them to continue on that current path. When feedback redirects poor performance, it motivates employees to follow the offered advice, make improvements, and overcome obstacles.



Improves engagement- Without feedback, employees can become disengaged. They may wonder: *“My manager doesn’t seem to care either way, so what’s the point of trying?”*



Promotes self-awareness- Through feedback, employees learn about their strengths and weaknesses, uncover their positive and negative tendencies, and see how their actions affect others



"When employees are engaged, they are more productive at work. They are absent less and produce more. They build better customer relationships and close more sales. So, what engages work teams the most? Their manager."





TRAITS

Traits are not inherently good or bad. Traits can influence how someone approaches work, but they are not evidence of results.

When assessing someone's performance, focus on specific actions, patterns, and outcomes that provide evidence of how those traits show up in practice.

This ensures evaluations remain fair, objective and aligned to defined standards rather than personal impressions.



Behaviors



Behaviors are the observable actions that demonstrate what we can see, hear, and describe with specific examples. Unlike traits, behaviors are:

- Specific-tied to what someone did or said
- Observable-able to be witnessed by others.
- Measurable over time-demonstrated patterns, not one time event
- Aligned to competencies, norms, or policies

When we assess competencies or performance, we are not evaluating who someone is, we are evaluating what they do and how they do it.



Evaluate Patterns Over Time

Performance is not one moment, it's a pattern. One great week doesn't make someone a "top performer" and one bad meeting doesn't make someone "developing".

Ask: What has this colleague consistently demonstrated across the full year?

Use: Frequency, consistency, and sustainability

Not: Only one moment, emotion, comparison to others

Examples: He really struggled in last month's project. (weak)

Across the past three quarters he has met 90% of project deadlines but has missed two high priority deliverables, both tied to follow through.(strong)



Use Observable Examples

Observable examples reduce bias, strengthen fairness, protect the organization, and increase trust in the review process.

Ask: What did the person do? When did it happen? What was the impact?

Use: Behavioral language

Not: Trait language

Example Trait Language:

She's unreliable.

He's negative.

She's amazing.

Example Behavioral Language:

She missed three documented deadlines this quarter.

He frequently highlights barriers in meetings without proposing solutions.

She redesigned the intake workflow, reducing patient wait times by 12%.

If you can't describe what you saw or heard, you shouldn't rate it.



Separate Intent from Impact

We often assume we know why someone behaved a certain way. Keep in mind, intent is invisible, but impact is observable. Using behavior language to explain impact helps ensure you are not judging character and protects against gender bias, personality bias, and affinity bias-the tendency to rate individuals more favorably when they share similar backgrounds, communication styles, interests, or perspectives.

Ask: What did the person do? When did it happen? What was the impact?

Use: Behavioral language

Not: Trait language

Examples Assumptions:

He doesn't care.

She's trying to undermine me.

Example Behavioral language:

During the meeting, she interrupted colleagues three times and did not address alternative ideas, which limited engagement and opportunities for shared decision making.



Avoid Assumptions About Motivation

When we assume motivation, we introduce bias. Motivation is internal. You can't measure it directly. What you can measure is participation, behavior, initiative, and output.

- **Ask:** What observable behavior supports my conclusion?
- **Use:** Behavior based language aligned with competencies and leaves room for conversation rather than accusations.
- **Not:** Common assumptions like: They don't want to grow. They are lazy. They are resistant to change.

Example of Assumption:

They're not committed to leadership.

Example of Behavior Language:

They declined two leadership development opportunities and have not expressed interest in expanded responsibilities.



BEHAVIOR VS TRAIT

She's very dedicated

She consistently volunteers to cover shifts during staffing shortages and meets all assigned deadlines.

He has a bad attitude

He interrupts colleagues during meetings and dismisses alternative ideas without discussion.

She's overwhelmed

She missed two follow-ups this month and required support to manage competing priorities.

He's always calm under pressure

During high volume clinic days, he reassigned tasks and maintained clear communication with staff and patients.



Make it Safe



Two Conditions of Safety



You care about their concerns (mutual purpose)



You care about them (mutual respect)

Crucial Conversations



PSYCHOLOGICAL SAFETY

What it is



Empowerment in Expression

Encourages employees to express their ideas and contributions openly, free from the fear of repercussions to their reputation or career.



Embracing Vulnerability

The courage to embrace vulnerability, own mistakes, and transform them into valuable learning experiences.



Trust and Support

Employees trust that their work environment and colleagues will not shame them for their genuine expressions and vulnerabilities, creating a supportive atmosphere.

What it is not



Avoidance of Accountability

Not an excuse to avoid accountability for one's actions or contributions. It encourages openness and learning from mistakes.



Excessive Risk Taking

It does not promote reckless risk-taking. Psychological safety encourages intentional risk-taking in a supportive environment, not impulsive or thoughtless actions.



Unquestioning Acceptance

Instead, it encourages constructive feedback and dialogue while ensuring that individuals are not punished for their honest contributions.



Element	What it Looks Like in Practice	What Undermines It
Admitting mistakes	Acknowledging an error in vaccine documentation or case follow-up.	Blame culture, fear of discipline, or punishing people for honest mistakes.
Asking Questions	Asking for clarification about a case definition, reporting requirement, or outbreak protocol before taking action.	Dismissive responses such as "You should already know that," eye rolls, or making people feel embarrassed for asking.
Raising Concerns	Speaking up about a gap in community outreach, an equity concern, inaccurate data, or a process that could affect public health outcomes.	Retaliation, being labeled "negative," or having concerns ignored.
Respectfully Challenging	Saying, "I have a different perspective based on the community data, can we explore another approach?" during planning or response meetings.	Hierarchy that discourages questioning, defensiveness, or decisions that cannot be openly discussed.



MUTUAL PURPOSE

- Others perceive that you're working toward a common outcome in the conversation, that you care about their goals.
- Seek mutual understanding as a starting point...let them be heard.
- The other person is acknowledging your needs as well.

If a person doesn't care about your purpose, make that the focus of your conversation. *(pg 137-
Crucial Conversations)*



MUTUAL RESPECT

- The instant that people perceive disrespect in a conversation, the interaction is no longer about the original purpose, it's about defending dignity.
- When we recognize that we all have weaknesses, it's easier to find a way to respect others.
- Lord help me forgive those who sin differently than me (pg. 139-Crucial Conversations)





THE FEEDBACK PROCESS



Feedback guidelines

Giving Feedback	Receiving Feedback	Building Agreement/Next Steps
Micro-Yes: Ask the recipient a yes/no question that prepares them for the feedback. Describe: Name the specific, observable behavior (data point). State Impact: Explain the impact of behavior on you, the team, the company, the project, etc. Suggest/Request: Provide an alternative/solution to what is happening. Requests can be any of the following: -Stop or continue a behavior -Begin doing something -Understand the behavior and its impact	Summarize: Share your understanding of the feedback. Ask: Inquire about the feedback with clarifying questions, consider repeating back the feedback to demonstrate your understanding. Respond: Engage with the suggestion/request. Possible responses include: -Expressing understanding -Accepting and explaining why -Declining and explaining why -Making a <u>counter offer</u> or amendment	Align: Brainstorm proposed future actions. Commit: Identify a specific date/time to follow up to ensure agreements are working and if adjustments are needed.



Receiving feedback

Summarize	Ask	Respond	Align/Commit	Personally Process
Goal: Demonstrates you are receptive and open to hearing the feedback. Example: My email to Isabel came across as confrontational because of my word choice and brevity.	Goal: Shows you were actively listening and wanting to fully understand the feedback. Example: Would it be better if I had messaged her on Slack or called instead?	Goal: Lets the feedback giver know you are processing the feedback and reflecting on its content. Example: In thinking about it, I wrote that email quickly as I was on my way to another meeting & didn't want to forget to follow up.	Goal: Positions you as wanting to apply the feedback and develop by demonstrating your commitment. Example: In the future, I'll avoid rushing so that my delivery method and tone aren't misunderstood.	Goal: Gives you space to unpack the provided feedback and self-reflect through your reactions and feelings. This is where you can use the Feedback Parser Worksheet template.

Feedback Parser Personal Worksheet

(source: LinkedIn Learning course, *Overcome Overthinking* by Melody Wilding)

Conversation Logistics: Who did you meet with? When did you meet? What was the topic of the feedback (use objective language to describe it)?	Step 1: Transcribe what the person said as best you can remember using their exact words, not your interpretation.	Step 2: List everything that's wrong with the feedback - the inaccuracies, blind spots, etc. This is also your chance (if necessary) to let out your feelings (joy, anger, confusion, etc.).	Step 3: Write down what could be right with the feedback - insights, improvements, learnings, new ideas, etc. What might be useful from this feedback?	Step 4: Commit to a next action - have a conversation, move on, make a change, etc. Trust your gut and follow your values here. What is something you could do to make your future self proud?
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Giving feedback

Micro-Yes	Describe	State Impact	Suggest/Request
Goal: Gets buy-in and allows the recipient to prep. Example 1: Do you have 5 minutes to talk about how your meeting went with Derek? Example 2: Can I share my thoughts with you about the email to Isabel?	Goal: Focuses on behavior, not the person. It is observable and specific. Example 1: You said you'd get that email to me by 11am, and I still don't have it yet. Example 2: During the meeting, you told everyone your plan to adjust the budget without checking with me first.	Goal: Provides clarity on why behavior/action matter and its impact on others. Example 1: Because I didn't get the message, I was blocked on my work and couldn't move forward. Example 2: I liked how you added those stories because it helped me grasp the concepts faster.	Goal: Creates alignment and commitment. Example 1: How is what I shared landing for you? Example 2: What do you think we should do next?

HOW YOU SAY IT MATTERS....

Doesn't provide meaningful feedback



YOU DON'T TAKE OUR TEAM
MEETINGS SERIOUSLY BECAUSE
YOU'RE ALWAYS LATE

YOU'RE NOT A STRATEGIC THINKER

Try this instead



WHEN YOU'RE LATE TO OUR TEAM
MEETINGS, WE DON'T GET THROUGH
THE AGENDA AND AS A RESULT WE
ARE BEHIND ON OUR Q2 DEADLINES

IN OUR LAST MEETING, YOU SPENT 20 MINUTES
DISCUSSING ONE ELEMENT OF THE DESIGN WHEN
WE WERE THERE TO DISCUSS THE 3 MONTH PLAN
OF THE DESIGN ROLL OUT



WHAT IF THEY REACT BADLY?



- They may feel like they are under attack
- They may go into flight or fight response
- Their self-esteem may be hurting or feels threatened

Have empathy and understanding.



KEY TAKEAWAYS

Strong teams are built through clear expectations, communication, and trust.

Addressing issues early to help mitigate conflict, strengthens relationships, and improve performance.

Effective leaders focus on observable behaviors and impact, not assumptions or personality traits.

Difficult conversations are more productive when people feel safe, respected, and heard.



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