



ESSENTIAL SUPERVISORY SKILLS TOOLKIT

INTRODUCTION

How do you help others succeed in performing their tasks? What are reasonable expectations, for both you and for them? How do you make that transition from individual contributor to team leader?

These are just a few questions that arise as you move from a staff person to a supervisor. As you make this transition, it's important for you to understand the skills required for success, and how you currently rate within those skills. This toolkit is designed to help you with both.

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WHAT SKILLS ARE REQUIRED FOR YOUR SUCCESS?



A supervisor communicates in many different ways that extend beyond words delivered in an email, phone call, or presentation. Employees draw meaning from the behaviors displayed on a daily basis including:

- Extent of actively listening
- Effectiveness of meeting facilitation
- Transparency with which important organizational and departmental messages are shared
- Attitude and demeanor with which they navigate the Volatile, Uncertain, Complex, and Ambiguous (VUCA) world in which we all work
- Delegation choices
- Conflict resolution approach
- Time management practices
- Praise and affirmation practices

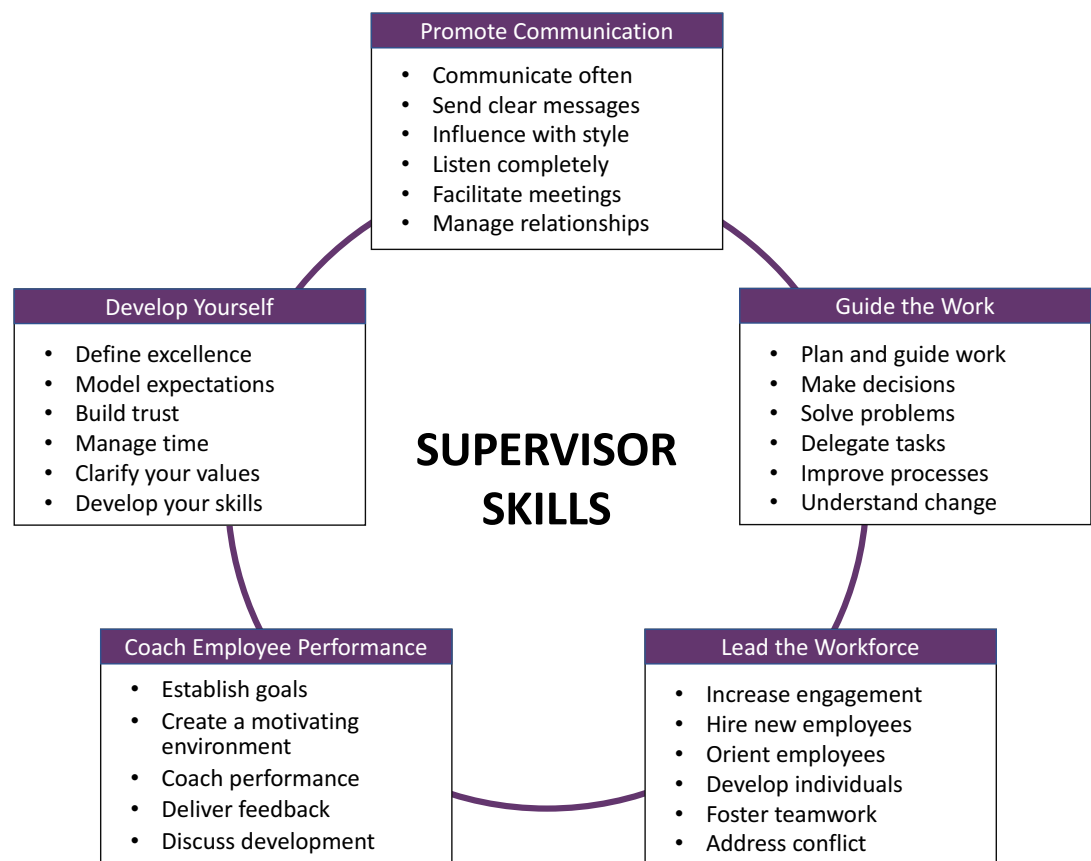
That's not to discount the importance of the formal messages that we deliver. Indeed, you should think carefully about those. The **Communications Toolkit** is also a useful resource because communication is such a critical component of a supervisory role.

HELPING OTHERS SUCCEED

Think about the atmosphere you want to establish. Fostering engagement requires that you involve employees to the greatest extent in planning and organizing the work. Invite them to share ideas and put decision making in their hands. You also need to facilitate employees' ability to reach the goal by clarifying roles, providing support, and removing barriers.

Supervisors motivate and develop employees to ensure they have the necessary skills and knowledge. They must delegate the right tasks to the right people. They also encourage individual responsibility and accountability. All of this requires crystal clear communication and active listening.

Every interaction, no matter how short or subtle, sends a message that either contributes to or detracts from engagement. When we look at the five areas of supervisory skills in more detail, this is what we see:



Engagement requires an ongoing decision to invest in the employee's success through:

Leaning Into and resolving conflict (part of leading the workforce)

Conflict is not the enemy. Conflict is not a personal attack. Conflict is an opportunity to engage in meaningful dialogue that deepens relationships. Work through conflict using a six-step process.

1. Set the stage for resolution by acknowledging the facts of the situation.
2. Gather any additional information necessary to understand the situation.
3. Agree on the problem as supported by the facts.
4. Brainstorm possible solutions.
5. Agree on a solution.
6. Follow-through.

Establishing a motivating environment

- Be intentional about what you do
- Listen to your team members and value their opinions
- Lean into change
- Celebrate wins



Coaching performance

1. Establish clear goals, roles, and expectations.
2. Provide feedback continuously.
3. Meet with employees regularly.
4. Provide written evaluation when warranted.
5. Revise goals and expectations as necessitated by the business.

You may also want to reference the **Coaching Toolkit** for additional tips on coaching performance.

At some point in your role as a supervisor, you may need to hire an employee. Consider how you want those pre-hire interactions to occur. Leave nothing to chance. If you need more guidance on how to deal with potential versus existing employees, the **Onboarding for Employee Engagement Toolkit** is a useful resource.

TOOL #1 - NEW SUPERVISOR SELF-ASSESSMENT

Self-development begins with identifying where you should focus. Use this self-assessment to rate yourself on the broad competencies required of a supervisor.

Instructions: Assess yourself as candidly as possible using 1 (weak) to 5 (strong). You are encouraged to share your results with a coach or mentor though not required. Short definitions have been added to each of the skills. You will also note that the competencies are grouped in five key supervisory skill areas.

Name: _____

Date: _____

ESSENTIALS OF SUPERVISION SELF-ASSESSMENT	
Promote Communication	
	Providing direction: Provides clear direction; sets clear priorities; fosters a common vision for employees; helps employees see how their work supports the organization's goals
	Listening: Demonstrates active listening; conveys understanding to others; listens with empathy and without judgment
	Influencing: Persuades others to accept a desired view; gains support and commitment; effects positive change in others' behaviors
	Communicating: Speaks clearly and expresses self well in groups; conveys ideas in terms the listener can understand
Guide the Work	
	Planning and organizing: Develops comprehensive project plans; monitors progress against goals; assigns clear responsibilities
	Delegating: Assigns tasks to others while maintaining responsibility for results; considers skill level of employee and challenge level of assignment
	Decision making: Makes timely and effective decisions; does not procrastinate
	Facilitating: Leads meetings or group efforts without directing the outcome; creates an environment of openness and trust; leads groups to decisions in which all participants feel ownership
	Analyzing: Gathers relevant information; considers broad range of issues and factors; uses logic; asks questions; involves employees
Lead the Workforce	
	Coaching performance: Works with and encourages employees when they succeed as well as when they do not meet expectations
	Developing staff: Provides timely specific constructive feedback; gives challenging developmental assignments
	Fostering teamwork: Clarifies workers' roles and responsibilities; encourages knowledge sharing; supports the team
	Addressing conflict: Identifies sources of conflict; uses conflict as a constructive means to exchange ideas; keeps energy focused on desired outcomes

ESSENTIALS OF SUPERVISION SELF-ASSESSMENT

Coach Employee Performance

Creating motivating environment: Establishes an environment of trust; engages employees in the organization; accepts failure; rewards employees appropriately; rewards improvement

Setting goals and expectations: Channels motivation; encourages others to achieve desired results; creates enthusiasm and commitment in others; clearly defines expectations from the start

Providing feedback: Carefully observes the employee's performance of tasks; shares observations accompanied by positive and developmental comments

Confronting difficult situations: Timely addresses conflict or other uncomfortable issues that affect the work

Develop Yourself

Managing time and setting priorities: Sets efficient work priorities; can work on many tasks simultaneously; balances importance and urgency of tasks

Seeking feedback: Is a lifelong learner; takes advantage of learning from others; implements new ideas from staff and superiors; implements changes in self and work area

Following through and committing: Follows plans through to closure; persists despite obstacles; keeps one's word

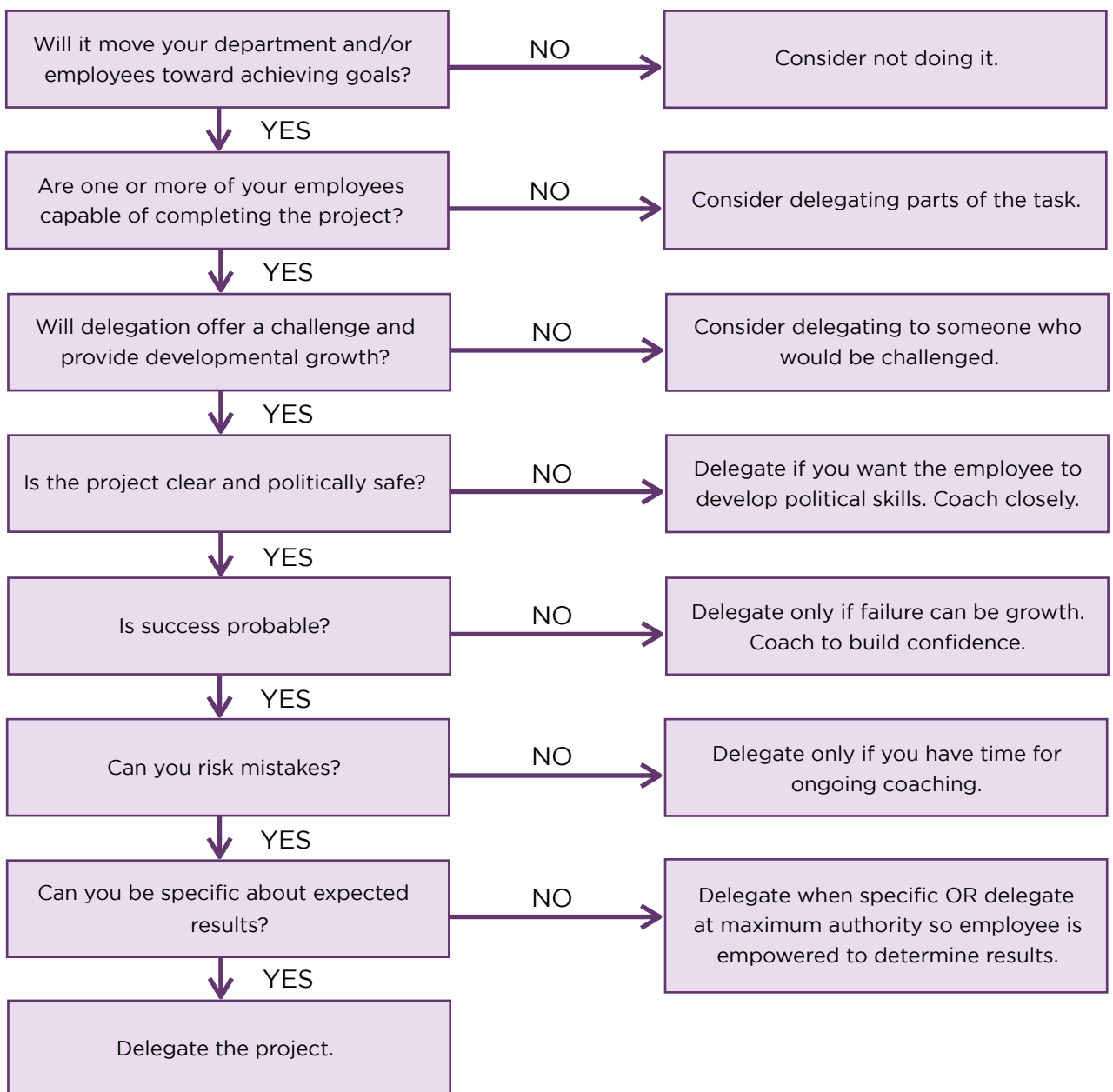
Defining and modeling excellence: Establishes a vision for the department and each individual; ensures that employees clearly see how they fit into the bigger picture

TOOL #3: DELEGATION DECISION FLOWCHART AND PROCESS

Delegation is the process of transferring responsibility and decision-making authority to an employee. Delegation builds trust, motivation, and strong teams. Successful delegation must be accompanied by an appropriate level of authority. Too little and the employee may be stifled; too much can create significant risk to the organization. Knowing what and how to delegate can be a challenge for a new supervisor.

When should you delegate?

Use this decision framework to help you determine when to delegate.



Delegation Process

1. Communicate the project, describing exactly what and when it needs to be done.
2. Explain why the task needs to be done and how it fits into the bigger picture.
3. Agree on the standards you will use to measure success.
4. Grant authority and clarify parameters.
5. Provide support and resources.
6. Get commitment and confirm your employee understands.

Select the Right Person

- Who is qualified and available?
- Who can be trained?
- Who will benefit in terms of development?
- Who will be motivated?
- Who will accept the planned authority level?

Delegation Tips for Success

- Delegate the whole project to one person.
- Clearly specify your preferred results.
- Assign the project, not the method.
- Ask employees for their ideas and input.
- Reward results.

TOOL #4: MANAGE YOUR TIME

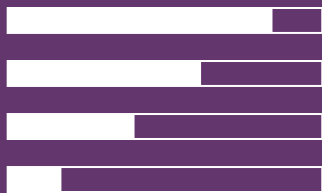
Are you exhausted yet? So many things to do, so little time. Managing your time is important for you and your department. There will always be competing priorities. There will always be other projects waiting to derail your day. There will always be changes and last-minute requests. You can't stop that. What you can do, however, is stay focused on your top priorities and learn a few time management tips:

- Complete your most important tasks first.
- Organize your office and your desk so that you can find things.
- Invest 10 minutes before you go home each night to create a to-do list for the next day and to pull any records or documents you might need for a meeting.
- Conduct a time audit to learn how you are spending your time.
- Don't procrastinate.
- Learn to be assertive, projecting self-confidence without coming across as arrogant.
- Learn ways to manage stress; stress can be a real time gobbler.
- Delegate.
- Eliminate your time wasters.
- Practice scheduling time buffers.
- Focus and block out distractions.
- Create a "stop doing" list.
- Use an urgent/important review of your tasks.

The Eisenhower time management matrix is a useful tool to help you put things into perspective. Quadrant II is where you should spend most of your time to achieve your goals. Examine your Quadrant I tasks to ensure that these tasks are not using up too much of the time you should be spending on Quadrant II tasks.

	Urgent	Not Urgent
Important	<p>Quadrant I</p> <ul style="list-style-type: none"> • Vital customer calls • Last minute assignments from your boss • Crises 	<p>Quadrant II</p> <ul style="list-style-type: none"> • Planning • Continuous improvement • Professional development • Coaching and mentoring
Not Important	<p>Quadrant III</p> <ul style="list-style-type: none"> • Meaningless reports • Needless interruptions • Low-priority email • Other's minor issues 	<p>Quadrant IV</p> <ul style="list-style-type: none"> • Time wasters • Irrelevant phone calls • Chit chat

Source: Matrix first mentioned by Dwight D. Eisenhower in an address to the Second Assembly of the World Council of Churches, Evanston, IL, August 1954. He attributes the matrix to an unnamed former college president.



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