

THE NEW MANAGER'S GUIDE TO LEADERSHIP

CONTENTS

- 03** How to go from employee to manager
- 08** The top traits of effective managers
- 15** How to develop your leadership goals
- 21** Managing culture and leading change



You've just been promoted to manager, and we want to help you get up and running quickly by supporting you through the learning stages.

We've begun this guide by looking at how to handle a promotion to management level and make a real success of it.

Once you've settled into your managerial role, then it's time to start thinking about making an impact. To help you with this, next we'll look at the top traits of effective managers, where we explore the responsibilities of the role and the bigger picture.

Shifting to a more long-term focus, we then spoke with three accountants on their personal and career goals to see how they're working towards them.

And finally, as a leader, how do you work to improve the culture within your business? We met with Stuart Hurst who brought cloud technology into his new firm, and faced some challenges along the way. Through the lessons learned from this, you too should be able to enact the change you want to see.

Enjoy your journey towards becoming a better leader, and remember to get in touch with us via **Facebook** or **email** if you want to delve deeper.

HOW TO GO FROM EMPLOYEE TO MANAGER

You've been working away, doing a great job for several years. You're competent, technically proficient and you've been noticed at work for doing well.

So much so that you've just been promoted and will be managing a small team. How do you make the leap from employee to manager?

Recognise that you have a new job

“This sounds obvious, but countless people take on a managerial role with a view that the new role will be done on top of their usual client-facing role,” Sue Willcock, Business Change Manager at Ellis Whittam, says. “The phrase: ‘How will I have time to manage people?’ is a classic tell-tale saying that new managers are approaching their role from the wrong viewpoint.”

TIP: The role of manager is not just a case of adding things to your to do list, it’s learning how to manage your new role and delegate when you need to.

Take a step back

Your new role will probably involve a number of new skills, including planning, reporting, making judgement calls, presenting ideas, coaching and encouraging, performance managing and inspiring others to perform.

“Whilst some of these things are about doing ‘stuff’, many more are about how you get stuff done. Take some time to ponder the word ‘leverage’” advises Willcock.

TIP: Consider how you will achieve business goals by using your skills and new role to get the most from others.

Be crystal clear on what’s expected

In some organisations, especially if a role is brand new, expectations can be a little vague at first. In others, the role may be clearly set out, but because you are new to the role, you are still working out what things mean for you.

TIP: Make sure you get hold of a job description and take time to go through it. Have a conversation with your own line manager about their personal expectation of both the role and how they like to work.

Believe in yourself

One of the biggest hurdles you might have to overcome when it comes to transitioning from an employee to a manager is confidence, says Catherine Morgan, Financial Coach at The Money Panel.

“The biggest obstacles that many will have is confidence in themselves and their ability to deliver and manage,” she notes. “You may find that you have gone from doing to managing others doing the doing!”

TIP: Understanding your people and getting the best from them will stand you in good stead.

Don't micro-manage

"It is important to give the people in your team autonomy, recognition and responsibility," says Morgan. "Get them on your side. Be personable and be interested in them more than anything else".

TIP: Position yourself as someone who is going to help your team to achieve success because your success is dependent on their success. And don't micromanage them.

Communicate

Helen Brent, a Manager at Sunflower Accounts, says communication is one of the most important things when you move into a management role.

"Make yourself available to listen to your former colleagues and to fully empathize with them as the change in structure can cause feelings of uncertainty and can be emotionally stressful," she advises.

Discuss and understand any frustrations, expectations and their future goals. This can help gain their trust and confidence.

TIP: Hold one-on-one meetings to explain the vision for the team and allow them to have an input on the end goal.

Set boundaries

"Going from a colleague to the boss, people can make the mistake of treating everyone as 'friends'. Whilst going for a night out can be good for team morale, maybe stay for one drink," says Brent. "Avoid gossip and remain highly approachable. You can be friendly whilst being their manager."

Recognise that you need to keep learning

"Some people expect to be a good manager with little investment in themselves or the consideration that they may need to learn new skills. Don't be this person!" says Willcock. "Know that you are learning and that it takes the same effort, resilience and reflection that it took to become the technical expert that you are.

TIP: Just as you made mistakes in your technical role, you will make mistakes now, as you learn to be a manager. Accept that you are learning and do the best you can for your team but also give yourself permission to learn.

In summary

Successful management is as much about self-awareness as the relationship between the manager and his or her staff. Good relationships are based on trust and engagement, and a good manager's role is to build these relationships early on. Expect to make mistakes but if you take on your new role willing to learn and grow, then you're on the right track.

Read more about leadership and personal growth here:

[Top traits of effective managers](#)

[Emotional intelligence and why you need it](#)

[Growth and leadership – what are your personal goals](#)

Your priorities are likely to change when you first step into a managerial role, and your focus shifts to the bigger picture.

Let's move beyond the basics.

What does it actually mean to be a manager?
Where should your focus be and how can you take charge of your role?

THE TOP TRAITS OF EFFECTIVE MANAGERS

Many people become ‘accidental managers’ when they get promoted. They’ve had previous training, or have learnt well in a particular role, and someone has thought – they’ll make a good manager.

If this is you, it can be good to think about the skills and attributes you now need to focus on, to turn yourself from a good manager into an excellent one.

What does the role mean?

Before you can develop as a manager, you need to be clear about exactly what it means to be a manager. What does it look, sound and feel like?

Usually, being a manager means being put in a position where you have a strategy or plan that needs to be implemented. It’s your job to ensure the team can implement that plan effectively.

In practice, ultimately this usually means one of two things:

- establishing and maintaining the status quo, or
- creating change.

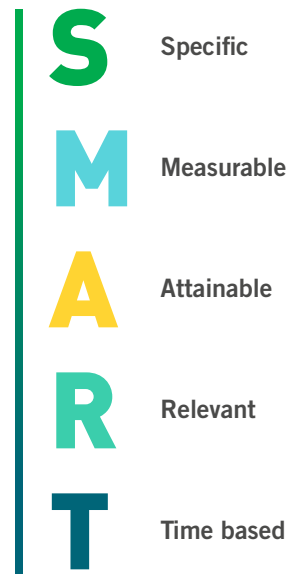
As a manager, there will be specific tasks – to manage budgets, suppliers, processes, customers, etc. This means that you’re operating both inside and outside the organisation. But it’s likely that your main responsibility will be towards people – your team around you, and a leader or director above you.



What does an effective manager look like?

An effective manager is a role model – but this is easier to say than do, and in some cases you have to challenge the status quo to create change. It's about inspiring people, motivating people, and creating new thinking. To do that, you need to be able to plan methodically, to communicate well, and to identify, motivate and reward effective behaviours in others.

You cannot be a good manager without good planning skills, and that planning is likely to centre on objectives. A proven method of effective management is to give your team SMART objectives – any task should be Specific, Measurable, Realistic, Achievable and Timebound.



Understanding how people work well together and individually

It's a cliché to say that your best assets are your people – but it's a cliché because it's absolutely true. In order to manage people well, you have to understand that different people thrive in different ways, and it's essential for you to be able to communicate with them effectively to understand how they'll work best themselves, and what they can bring to the organisation.

For example, not everyone is motivated by money. So you need to create those motivators yourself and ask for regular feedback from your team; that way, you'll understand what's important to them and be able to motivate them more effectively.

You need to think: how can I motivate and empower, and leave people satisfied? Generally speaking, this involves leading by example, and recognising that most change comes from nurturing behaviours.

Those behaviours revolve around five elements:

- communicating
- empowering
- delegating
- inspiring
- mentoring



Where managers really come into their own is when the organisation's business plan cascades down into an operational plan.

Ensure you can see the wider picture, as well as the detail – part of your role as manager is to help the individual understand what they do and how it fits into the team. As things cascade upwards, they become more strategic.

Moving into pole position

Management guru Peter Drucker once said that as a manager it's easy to set tasks, but you only reach objectives in partnership with the individual.

KEY TIP: Don't decide who's doing what and then send them an email. Instead, sit down with them and say five things. This is what we'll do as a team, this is what I would like you as an individual to do, these are the targets, this is how we'll measure success, and what do you think?

At this point, if there's resistance or things don't go entirely according to plan, be proactive and positive about that; don't just criticise people or ignore a problem.

Where there are weaknesses, which we might rename 'development areas', put those into the plan and offer training. That's how you enhance capability, and how you continually ensure that your people are an asset and can enhance the organisation's growth or development.

Consider how that would look in your business. Does everyone know what's expected of them? Do they have the skills to deliver? Are they motivated towards delivering? If you can answer yes to all those questions, you have some context to work towards.



How to become a truly great manager, rather than simply an excellent one

To do this, think behaviourally. Many managers think the job is about giving tasks – but there might be behavioural objectives too, such as asking a team member to consider values or ethics.

Decide what your priorities are, and which objectives are more important than others. If there's a sequence, help team members understand that others in the team are relying on them to do things in a certain order. The key is to ensure people feel part of a team, rather than at the bottom of a series of jobs.

Good management behaviours can be remembered as being ABCD:

ABLE

Leaders demonstrate competence by having the knowledge, skills, and expertise for their roles

BELIEVABLE

Leaders act with integrity when they tell the truth, keep confidences, and admit their mistakes.

CONNECTED

Trustworthy leaders care about others. They are kind, compassionate, and concerned with others' well-being.

DEPENDABLE

People trust leaders who honour their commitments. DWYSYWD – doing what you say you will do is a hallmark of dependable leaders.

Being an effective manager – 5 key takeaways

- 1** Know the organisation's culture. This is "the way we do things round here." Without understanding it, you can't make changes – you need to translate the culture into "this is what I need to do" when you speak to staff.
- 2** Be knowledgeable about frameworks. These include: the legal and regulatory framework in which you operate, the economic and political environment in which you work, and the social and technological opportunities and threats to the organisation's business.
- 3** Get the best out of your people. People work in different ways and have different strengths. Know when to discuss things face-to-face, in team meetings, by email or phone, or over the intranet. Don't rely on one particular channel, and make what you're doing relevant to each person.
- 4** Interpret, translate and make relevant. Then, ask for feedback. When your staff tell you what they think – good and bad – it can influence and help you adjust what you're doing going forward.
- 5** Gain the staff's trust. Trust is the most powerful single quality you can engender in your staff – but it takes time and integrity. Give time and resources; and reward positive behaviours, not just results.

Now that you know how to manage effectively, it's time to step back and look at the bigger picture.

What are your personal goals in amidst all the day-to-day managing? What's it all for?

High performers set goals to cement a long-term vision and maintain motivation; let's follow their lead.

HOW TO DEVELOP YOUR LEADERSHIP GOALS

It can be all too easy to let the day-to-day consume your time. But thinking about your career long-term is essential if you want to make sure it's varied, interesting and satisfying to you.

So what do you want your personal growth to look like over the coming decades? Is your prime focus mainly on growing an accountancy business? Are you thinking enough about work-life balance?

We spoke to three accountants at pivotal stages of their careers, with a variety of goals and approaches.

Shape your career around your personal goals



Richard Sockett is an Accountant at NJP Accountancy

Personal goals: to travel, get married, and have a family.

Strategy: to make enough money in his career to secure his ideal future.

“I’ve been with the company about eight months, and it’s been a fast learning curve. I’ve come to the profession relatively late in life – I used to be a computer programmer.”

That technological background has been extremely useful in his accountancy career and means Sockett has been able to become proficient quickly on Xero, Quickbooks and Sage.

Read more on just how essential such digital skills are in the finance sector.

“It can be rather like playing computer games,” he observes wryly, “in the sense that if you get into the rhythm of it, it doesn’t feel like work.”

Sockett’s long-term goal is to use his accountancy skills to reach the position of financial advisor.

“My future thinking is not necessarily accountancy-related. I want to get to a position where I’m confident enough to impart knowledge to anyone who comes in with different needs and wants – to buy a piece of land, or sell a house, or buy shares. **The face of accountancy is changing dramatically**, and sometimes I think parts of the sector are not sustainable. I would like, eventually, to be doing something on a national basis.”

Having a clear idea of future plans means **setting goals** that are practical, reasonable and time-bound: don’t try to do things too quickly, but do give yourself targets.

“At the moment we have so much work on, I could work 24 hours [a day] from now until Sunday – but it’s important to set aside time to think about your long-term future.”

And his leadership tips for younger people at similar crossroads in their lives?

“To be interested in accountancy, you have to be interested in business. It’s about solving problems.”

You have to take it seriously, he adds, “but you also have to recognise that as you get older, your priorities change.”

Nowadays, “the main focus on my career is not financial growth. It’s about making enough to be secure, but to shape my career to personal ends – to travel, to get married and to have a family.”

“I’ve been with the company about eight months, and it’s been a fast learning curve. I’ve come to the profession relatively late in life – I used to be a computer programmer.”

For Sockett, “it’s about building a career in a way that enables me to do that. The job I have now is making me feel good and putting me in the place where I can achieve those aims.”

KEY TIP: Take charge of your career and make sure it’s getting you closer to your goals day-by-day.

Determine your goals and work backwards



Mark Telford is a
Director at Telfords
Chartered Accountants

FCA

Strategy for personal goals: work out your goals first, then create a plan to get there.

Thinking about your own personal goals can also help you become a better accountant, because it helps you see things from your client's point of view.

"I do focus a lot on personal goals for the business owner," says Mark Telford, Director at Telfords Chartered Accountants. "If you're self-employed, you haven't got a job – you've got a business."

"There's lots of terminology around lifestyle and **work-life balance** and clients often say the words without thinking about what they really mean," Telford says. "I like to turn it round and say – what do you want to achieve? This might be things like: I don't want a 40-hour week; I want a two-week holiday three times a year; I want to get my mortgage out of the way in ten years' time."

"Having decided what your own goals are, you figure out how to get your business to work on those lines. This really flips things round. A lot of business owners I speak to haven't thought about it like this before. What exactly do I want, and how can the business get me there?"

Then, says Telford, "having **decided what your own goals** are, you figure out how to get your business to work on those lines. This really flips things round. A lot of business owners I speak to haven't thought about it like this before. What exactly do I want, and how can the business get me there?"

To help you in working out your own goals, Telford advises that there is in fact a triangle of goals you can focus on.

"There's time freedom, financial freedom and comfort freedom. The third normally comes as a result of the first two being achieved – if you're not overworked and you're not stretched for money, you'll be less stressed and more relaxed."

KEY TIP: Determine your personal goals first; are you aiming for time freedom, financial freedom, or comfort freedom?

Continuous improvement and growth



Hannah Williams is CFO at Tiny Rebel, an award-winning brewing company

Personal goals: continuous growth and improvement for her company.

Strategy: forecasting and working towards achievable mini-goals.

“The focus for me is on continuous improvement,” she says, “and this applies just as much to the company as my own career.”

Tiny Rebel is family-run and growth has been impressive – from a standing start to £10 million turnover in the space of seven years, and from zero to 126 employees in the same time.

“I love my job because this is not a traditional business – we try to be different, brave and make big decisions strategically.”

That naturally leads to a long-term view, with the team constantly “thinking about forecasting, costs, and then making business decisions on the strength of those insights.” [Learn how to get started with data analytics and forecasting here.](#)

Being a Finance Director brings huge responsibilities, but this makes it a highly satisfying – not to mention essential – career.

“Finance can make or break any business. If you have a strong, differentiated team and you focus on constant improvement, you can introduce change and propel the business forward.”

Williams’s particular challenges at Tiny Rebel are not just about being a fast-growth organisation.

“The business is multi-faceted: we have an online shop, a brewery, and bars. So we’re working across sectors – retail, manufacturing, and service.”

Finding the synergies between them is exciting.

“It means you have cost-saving advantages, but on the other hand you have overheads that are hard to absorb.”

And looking at your next five, ten, fifteen years?

“In five years’ time I hope we will still be innovative, but also bigger. That’s complex to achieve; when you are small, you can be flexible. I want to ensure our increasing size doesn’t compromise that.”

And as she explains, “it is really difficult to forecast even for five years because **our growth has been so fast** and the industry changes so quickly. Plus of course there are external factors.” Williams says she wants “to avoid mentioning the ‘B’ word, but it isn’t making us panic.”

Forecasts are something to handle pragmatically.

“When we started up I did a three-year forecast with the plan of breaking even, but we achieved that in nine months. I only put together forecasts that are achievable – and anything above that is a win-win.”

“It is really difficult to forecast even for five years because our growth has been so fast and the industry changes so quickly. Plus of course there are external factors.”

KEY TIP: When planning towards your goals, one possible strategy is to set achievable goals.

Key takeaways for long-term career growth

- 1 How do you see your career developing?**
Will you specialise? Work in industry, practice, or start-up? You don't have to know all the answers, but evaluating the options may show where you want to go.
- 2 Do you have the requisite skills?**
As well as finance skills, technological understanding is essential nowadays: you need familiarity with the range of accounting software your clients might be using.
- 3 What is your five-year, ten-year, twenty-year plan?**
It can be illuminating to think long-term. Don't let this be restrictive; this is your chance to envision your goals so you can put a plan into action to achieve them.
- 4 What does success look like for you?**
It may not necessarily be about growth at all costs. What are you trying to make the business do for you? Does success mean a large house and car, or is it about freeing up time for holidays, for spending time with family, or for retiring early?

What next?

We've seen a range of personal goals from just three accountants above.

Richard is harnessing his career and keeping his personal future goals of travel, family and security firmly in mind.

Meanwhile, Mark is helping his clients to determine their own personal goals. He believes working backwards from this point is the best way to map out a path towards achieving them.

And finally, we met Hannah, who's long-term goals are further business growth and improvement for her brewing company, and she's working towards this through setting achievable mini-goals.

There's no wrong answer when it comes to your goals. Everyone has their own idea of happiness.

So be brave, and look up from the day-to-day this week to decide what success looks like for you.

Then create a plan to get there.

Whether you're in a managerial role or not, anyone can embody leadership. Being a leader is much more than your job title.

And one thing truly great team leaders do is influence the culture of a company for the better. Negative influences can fester within a business and breed a toxic culture.

But how exactly can you effect positive change in your company?

MANAGING CULTURE AND LEADING CHANGE

Stuart Hurst had an uphill struggle when it came to implementing a cloud technology strategy at his new firm. Here's how he won over his sceptical colleagues.

Stuart Hurst started at UHY Hacker Young with the goal of bringing cloud technology to the firm. He was optimistic about the work and excited to get stuck in.

But he didn't bargain for the cultural barriers that he would face. He wasn't just bringing in new technology – he had to change mindsets and build a team as well.

Building a new culture is no easy task for a CEO, let alone someone in a middle management role, but Hurst has proven it's possible.

Benefits and difficulties

Hurst oversaw the adoption of cloud software at Styles and Co, and expected the process to be much the same at UHY Hacker Young, a much bigger firm.

He also had the buy-in of UHY Manchester's Managing Partner, Mark Robertson, which gave him the confidence to take his project forward.

"He had hired me, so I had support from the top. The pair of us ran a presentation on day one about what I was there for, so people were aware of what was coming."

So Hurst decided the best approach initially was to explain the benefits and be upfront about the difficulties – a big change in culture always involves a few hiccups in the early stages. "I said: 'For the first month, you'll hate me.'"

"Using the cloud, the average 18-hour job comes down to six hours. But, in the first three to six months, it goes in the opposite direction. In my previous company, those tasks went up to 21 hours in the bedding-in phase, because people are getting used to the system and you're spending a lot of time training. Without a vision for how to progress, I'd have been sacked in those first three months. It's tough to manage."

Winning support

When Hurst initially came on board, his team consisted of him and one disgruntled bookkeeper who was extremely suspicious of cloud technology. "It was about reducing her workload. That was my sell," Hurst recalls.

Having finally won the bookkeeper over, Hurst needed to start changing the rest of the culture, one person at a time. His relentless positivity and enthusiasm for what he was doing were definitely a big help. He was upbeat about accountancy in a way that was foreign to the firm at the time.

"You need to find what will get people excited about a new way of working," he explains. "Show them how they can see stuff in real time, and how they can spot what's gone wrong and address it there and then."

It helps to see the bigger picture. Staff realised they wouldn't just be number-crunching – they'd be doing advisory work and consulting too.

Overcoming resistance

Big cultural changes will never be universally accepted, and Hurst's experience is no exception. "If I had £1 for each time I heard 'That's how we've always done it', I'd be a very rich man," Hurst laughs. "Transparency is key. You need to share all the successes, as well as all the things that haven't gone so well."

The final ingredient for bedding in cultural change is bringing in new people. They will embrace the new culture from day one, and help to spread it.

"The younger generation are great for helping to instigate change," Hurst says. "They've got no preconceptions. It creates a sort of cultural change sandwich when you've got partner buy-in and champions at the bottom. It squeezes the middle."

A team driving change

Now Hurst has built a dedicated cloud team of 20 people, and they're all working to drive change. They've converted more than 400 clients so far, as the cloud-first approach slowly becomes the norm.

"We've gone from a workplace culture akin to ('80s kids' show) *The Raggy Dolls* to a motivated, highly efficient team of accountants," he says. "Staff are so excited about this way of working. They're no longer just whacking numbers into a spreadsheet. Staff can see everything in real time and connect the dots. Their work has become business advisory."

"The younger generation are great for helping to instigate change," Hurst says. "They've got no preconceptions. It creates a sort of cultural change sandwich when you've got partner buy-in and champions at the bottom. It squeezes the middle."

In summary

Any big change within an organisation is disruptive at the beginning. But being clear on the benefits and challenges at every step of the way is a key factor in getting your team to adopt new ways of working.

For more on leadership and instigating change:

8 key ingredients for a positive business culture

How to lead through uncertainty

How to raise the digital intelligence of your workforce

Stuart Hurst's story of implementing culture change centred around his need to implement cloud technology in his firm, but the lessons learned are far-reaching.

Once you've reached the point where you feel confident enough to direct and steer change within your firm, you'll likely face the same challenges. From Hurst, we've seen that honesty, winning people over, and working together to enact the change are essential.

Together we've looked at how to progress to a managerial role, become a great manager, take charge of your long-term career, and be a proactive force for change within your company.

Regardless of what stage you're at in your own journey, we hope some of the people we met in the previous articles inspired you to never stop learning and never stop improving.

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