

## Realistic Expectations? The role of the line in people management

Mini-conference: 21 May 2015

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### Welcome and Introductions from the Conference chair

*Penny Tamkin, Associate Director, IES*

The theme of the day was introduced by Penny Tamkin: the focus on the role of the line manager, personnel issues in organisations, and how line managers struggle with their role.

When asked to describe their best line manager in three words, examples included: dealt with things calmly; equal status; maintained good relationship; takes the 'heat' out of situations; respond rather than react; challenging; fair; recognition; reward through interaction; motivated; encouraging; empowering; trusts rather than micro-manages; enabling of long term change; supportive.

### Setting the Scene

*Stephen Bevan, Director, Centre for Workforce Effectiveness, The Work Foundation*

Stephen was fresh off the plane from Brazil but defied jetlag to give a fascinating and energetic talk that set the scene for how important line management is for organisational performance.

Stephen highlighted that bad management is costly and in general the UK is worse at it than other countries such as the USA, Japan, Germany and Sweden (CMI 2014). It is estimated to cost UK businesses over £19 billion per year in lost working hours (BIS 2012).

The CIPD (2014) reported that management has long been seen as a weak area of the UK and that this is central to poor UK productivity – it is all the line managers fault, Stephen said, with tongue in cheek. The CMI study quoted above indicates that in high-performing organisations, 80 per cent of managers rated their own line managers as effective or highly effective, compared to only 39 per cent in low performing organisations.

In terms of trying to improve the stock of management there are three ways organisations can help as articulated by UKCES in 2013:

1. A commitment to management and leadership development
2. HR practices that reinforce management leadership development such as performance management
3. Alignment between business strategy and HR strategy

Stephen said that the message constantly heard about line management is generally a negative one: eg, reducing the cost of management to the NHS– ie, having fewer of them.

Some recent research published by Nick Bloom and John Van Reenen at the Centre for Economic Performance at LSE indicates that a bundle of management practices are central to productivity in manufacturing organisations, including managing operations and monitoring targets and incentives. Stephen confirmed that there is a great deal of research showing that line management practices are critically important to productivity.

Stephen acknowledged that despite knowing this for many years there does not seem to have been a great deal of movement to advance line management. He said that it is very important to understand what attributes people should have to fill the role successfully. It is necessary to be clear about management responsibilities and how people can manage the multiple expectations of them in the role.

Stephen spoke of how first line managers experience pressure and expectation from all directions, including senior managers, direct reports, HR and external factors such as the market, the sector and the size of the business. Expectations include:

- undertake welfare and performance management;
- use technology correctly to communicate and perform tasks;
- manage discipline, grievances, attendance problems and work-life balance;
- maintain standards and meet targets;
- manage budgets and monitor team performance;
- motivate and manage team using soft people skills.

Stephen expressed this as 360-degrees of pressure and asked if there is in fact a job design task to be done to streamline the role as there seems to be both role overload and job ambiguity for these people. He asked, in the light of this, why people still become managers and suggested that status, money and challenge play a role but that often people don't have much of a choice – for example, technical experts who have to take on management responsibilities to move on with their careers.

Stephen said there were five things he wishes they'd told him before he became a manager and that these were the areas that even in 1994 people were finding difficult. They are:

- giving bad news, (especially if you don't agree with it yourself), giving difficult feedback, and saying no;
- managing the performance, rewards, development and careers of direct reports;

- managing and motivating teams – which can be really complicated and difficult or energising and rewarding;
- balancing fairness and the need for direction and decisiveness;
- communication during change which requires human skills of coaching, empathy and interpersonal judgement.

In conclusion, Stephen asked whether our expectations are in fact too high for line managers? It is a difficult job and easy to underestimate both the skills required and the impact they have on organisational success. Organisations must start to invest proper time and energy in appointing, supporting and developing their line managers. With the right support to do the things that matter most, line managers can do an enormous amount to deliver productivity and results. Whatever we have been doing for 20 -30 years hasn't got us there yet, so it is time to do something different.

## Engaging and Motivating the Team

*Dilys Robinson, Principal Research Fellow, IES*

There has been a great deal of discussion about engagement, yet despite this it seems that many organisations still struggle with it. One area of frequent debate is whether there is any actual evidence of its impact or does supporting evidence remain largely anecdotal? Furthermore, if employee engagement is such a crucial consideration for organisations, why do so many struggle with establishing an engaged workforce?

Plenty of recent studies have shown that an engaged workforce has several benefits for organisations. Organisations with higher levels of employee engagement tend to report higher sales and profits as well as increased customer satisfaction and decreased employee absenteeism. One central consideration in many of these studies has been the role of the line manager, often highlighted as a key driver for employee engagement. One particular area where line managers are crucial for engaging employees is through living the organisational values and mission statement.

Although there are many factors that can negatively impact the engagement of employees, the single largest impact that diminished employees' engagement was their line manager. This raises the simple question, if the impact of the line manager is so clear both in terms of engaging as well as disengaging employees, why is so difficult to define an engaging line manager?

Robinson et al conducted a benchmark study of 90 middle managers in the NHS by asking their teams to describe their attributes. Although there were some differences in the word clusters used to describe engaging line managers, several themes emerged. Engaging line managers were seen as good communicators and very supportive of their team. They tended to absorb complaints and sought not to dump on their team, instead they were keen to celebrate and gain recognition for their team. Engaging line managers were also described as lighting the path, demonstrating values, and highly competent. Finally, they were very aware of the big picture, and were really good at tackling difficult problems.

Engaging managers often felt that they were not given sufficient direction even when they asked senior management for guidance. They found that they were ill equipped, with either no or too few resources to draw upon. They occasionally felt that they were communicating unclear or inconsistent messages, while also lacking the autonomy to lead their team. Engaging line managers also described themselves as being squeezed with pressure coming from senior management which they sought to absorb and keep from their teams. Some line managers even found themselves managing teams which were too large with sometimes hundreds of team members. Finally, there was often a lack of role clarity when handling their teams.

Nevertheless, there is some evidence that engaging managers can be developed through practices. Organisations can develop engaging line managers by writing clear guides on how to be an engaging manager; this especially important when the line manager has been promoted into this role without having prior people management experience. Organisations should also provide competency frameworks which managers can use when conducting people management. Engaging line managers must also feel that their efforts are not only recognised but they are rewarded, otherwise they may divert their attention to actions which they feel will be more rewarding in the long term. It is also important that they know can get help and where they can find it. Finally, while engaging line managers are often seen as role models by their teams, it also important that they have role models in their senior managers on which they can base themselves.

## Clarifying the Role of the Line in Talent Management

Wendy Hirsh, Principal Associate, IES

What is talent management? It feels like a 'tangly ball of wool' which, unintentionally, HR can make difficult for

the line with 'process heavy' concepts such as succession planning. There are two issues here: (i) LM's are being given poor tools; (ii) 'talent' has become such a fuzzy concept, it's 'no wonder they get confused'.

Wendy suggested it might be better to change to the 'C' word: 'career', (ie having a 'career conversation'); people are worried about change and uncertain over the message from senior level; the 'T' word ends up being 'part of the problem'.

'[we need to] Rein in our rhetoric about talent... think about what we're asking the line to do, in human terms.' There are four key areas:

### 1) Talent Spotter

- TIPS FOR HR: It is difficult to 'talent spot' a 'potential', or 'what we are not yet' – it is hard to tell what a human being can become as people can show talent at varying stages of their career.
- The 'T' word is a difficult word for managers. In English language it means 'innate' or 'unusual' – HR formalises this and uses the term differently. It is important therefore to never use the word without explaining what it means
- A 'talent grid' for example can be very confusing. A framework saying 'can they be that?' with criteria produced from what they are doing now may give indication of potential, but couched in terms of what the person can do now. An 'action oriented' label is important, otherwise talent management becomes about segmentation.
- TIPS FOR LM's: 'talent is relative' therefore it is important for LM's to know the people that they work with, and to be able to recognise what is good about the way individuals work in relation to other people. Talent for individuals is pointless; whereas talking about their careers arouses self-questioning.

### 2) Career Planning and 'Help Mate'

- TIPS FOR HR: Not career coach, but a 'career converser' with interest and support from career/ talent frameworks to reflect on career issues from a person's point of view. However for the LM, having these conversations can be tricky.
- A 'not very senior' manager may not know that much more than the person being managed, meaning that 'you can't look up very far, and you can't look out very far' for career opportunities.
- It is not realistic therefore for LM's to be able to pick up on everything so why does HR expect it? There ought to be a second source for LM's to look to for

support as career planning is a 'collaborative activity'.

- Managers need more training on having career conversations at a more holistic level to ensure the right message is being sent. In this regard it can be good to 'rehearse in a safe place' through role play and other practical activities. Embedding career-planning workshops into pre-existing talent programmes can enable people to think about development and skills.
- TIPS FOR LM's: role is to help people start having a conversation about career planning. It is important for the LM to be comfortable with facilitating the person exploring career pathways when there may be a wide and potentially personal agenda to the conversation. Confidentiality is key, as is the 'need to take personal care' rather than use an appraisal to 'jump start' future conversations.

### 3) Talent Developer

- Talent isn't just about skills, it is 'wider, and [more] human' than the frameworks currently in place.
- TIPS FOR HR: Clarity of process, programmes and 'talent pools' are key to prevent LM's from jumping into talent management programmes with no idea of timeframes etc. For example, in the public sector, often too many people are placed on talent programmes at one time, and the expectations can be too high.
- With this in mind, 'talent' interventions should be pitched at real business needs.
- TIPS FOR LM's: LM's should see themselves as 'facilitators' for development; 'coach' is a misleading title; the manager's role is to give individual feedback, and opportunity for reflection, i.e. to 'wrap the back end of it' to enable the individual to work it out for themselves.
- Need to think more about who is being put forward for what, i.e. people might not be very pushy about their own development despite having potential.

### 4) Collaborator with other Managers

- Rather than leaving somebody on their own, it's about creating a 'management community' – grow for future needs in order to give other managers support along the line.
- TIPS FOR HR: A means of getting groups of managers to look at 'talent' together, not 'rating and ranking' but coming together to support

opportunities which you may not be able to facilitate yourself, i.e. 'choreography' needs of HR.

- TIPS FOR LM's: look wider in terms of having an interest in other managers and people - not just on your own.
- Help people understand how you and your organisation are perceived more widely, have to get other people to see them how you as a LM see them.

## The Line Manager as Change Agent

### *Sharon Varney, Principal Associate, IES*

The role of the line manager in change is not well understood but the challenge of managing change is more difficult than ever and there is a new role for line managers, that of 'change interpreter'.

The VUCA world. Sharon used the concept of a VUCA world (Volatility, Uncertainty, Complexity and Ambiguity), to explain why change is so difficult. Sharon said this kind of environment makes life very hard for line managers.

Sharon then outlined how the different roles in change processes within organisations tend to be delineated. There is the:

- Change Leader (CL) who sets direction: tends to be quite senior and co-creates the vision or strategy and possibly role models it too.
- Change Manager (CM) who delivers the change: this is often a senior professional reporting in to the Change Leader and who monitors and manages the process, plus draws learning from it.
- Change Sponsor (CS) who supports and governs the change.
- Change Agent (CA) who is often the HR or OD professional advising on people processes and supporting on communication and engagement and who may also design and deliver programmes around the change.
- Change Interpreter: (CI) this is a new term that Sharon has coined to represent those line managers who are responsible for making the change happen in their team. What is interesting about the role is that the Change Interpreter has no part in the change team and so is excluded from setting vision, decision making and shaping the change which makes the job of interpreting the change particularly hard.

The CI is often excluded from conversations about change and from having a clear set of goals and specified role in change like the others involved.

Line managers have to create the conditions in which change to succeed in the workplace and smooth the transition even when they are not party to the planning. The Change Interpreter role of line managers has four components, each of which is complex in its own right, to it but often the line manager is not aware that these things are part of their role:

- Promoting a positive change culture
- Making sense and giving sense
- Inspiring change
- Supporting the transition

Line managers are key to promoting a positive change culture. They need to create the conditions for change to thrive, overcome the natural resistance and cultural barriers to change, create a culture of innovations so that change can bubble up from the team and create change-able teams. If the team is not ready for change there is no chance of success with the change programme.

Key activities for the change interpreter are to:

- Notice what is changing, which is harder than it seems.
- Make sense of top down change – again difficult as change is often expressed very generally and line managers have to interpret it in a specific work context.
- Make sense of bottom up change by translating it into general change, giving form to the change, making it coherent and communicating it to people.

Sharon acknowledged that, for line managers, change can be a great challenge. They see only a tiny corner of the big picture of change yet it is their role to enable change in their teams in line with the big picture. Each of the four activities are critical and if one is left out it is hard to make effective change. Line managers can feel stuck and bombarded on multiple fronts.

Recent work by the Henley Forum has asked knowledge and learning professionals how they could cope with change in a VUCA world. This slide views change as a progression from past change through change now to future change outlining some key activities associated with each facet. For example, past change is about responding to change, change now is about creating change and future change is about preparing for and anticipating change. The latter activity helps to identify things that will seem obvious when they arrive and which people will ask why we didn't see it coming.

Often that is because we weren't looking for it so anticipating what might happen is very important and line managers are expected to be doing this. Many sectors are still picking apart the effects of the downturn of the economy yet are also trying to work with strategic change.

This world is new for HR too. How people work may have stayed the same but the context has changed and is changing. HR can help line managers to understand the VUCA world, clarify their role and expectations, how they are Change Interpreters, and support them in the knowledge and skills to be effective in this world.

The line manager is a Change Interpreter rather than a change agent and it is HR's job to work out what this means for line managers and help them to work in the VUCA world.

## External case study on Performance Management *Ryan Cheyne, People Director, Pets at home*

Pets at Home is a company offering multiple services and a charity focused on rehoming pets and raising funds to support other rehoming centres.

In 2013 Pets at Home was awarded first place in the Sunday Times '25 Best big companies to work for'. Key to the company's success have been line managers.

Pets at Home are 'firm believers in the service profit chain'. Their colleagues and customers own pets, they bond together over a love of pets and therefore this has been the company's focus over the last few years. This didn't just happen overnight – 10/20 years ago was an entirely different picture but they have deliberately gone in this direction creating a 'powerful combination'. Ryan's talk today is not based on academic research, but 'based on the stuff we do'.

How do people see performance management? – in essence we say if you're not doing well, we'll put you on performance management? This understanding becomes a 'nuclear deterrent'. For Ryan, it's more about creating an environment... keeping things 'simple', but simple does not need to mean not thought through. He argues HR is at times too hooked up on process and should keep work 'simple to do, simple to understand, and simple to communicate' through use of simple language and documents, 'try and make it easy'.

'It's not about process, it's about people.'

So how did they win the No.1 best company to work for award? They created an environment, and a holistic

view, where the LM's role is conceived of broadly. They did this through three areas:

1. They 'recruit without compromise' as if you get the right people in to start with, performance management 'takes care of itself' rather than becoming about 'error correction'. They have a three-stage process of assessment centre, practical (in-store) trial, and interview. If they get this wrong, performance management can lead to turnover issues.
2. Once they have the right people in, they put time and energy into training and developing them: 'give them the focus to do the job properly and they will fit... invest time and money and effort in them'. The demand for training is sustained, rather than brought in reactively to solve a problem.
3. Rewards: 'certificates and recognition still matter. People do not grow out of this'. Rather than focusing on pay as reward, this is about recognising people and thanking them'. The ability to recognise behaviours and the things that you want to recognise in your staff is 'powerful...it becomes viral', e.g. using Facebook and other social media to 'boast' / spread recognition about a member of staff to spread a picture of 'what good looks like'.

However there are still problems and challenges with this. Appraisal as a focal point is one example. They just try to keep this as simple and straight forward as possible. Their own appraisal form is 'quick, simple, engaging... and it provides a measure'. Although Ryan recognises that providing some structure is necessary, he uses the appraisal form as 'a tool to help them have a conversation rather than a process about engineering completion of the form', he said they are 'not big on gradings'.

For example, they do not use the standard '9-box grid' because there is too much 'sitting on the fence when you've got to make your mind up'. Their version is much more simplified and a tool to 'trigger a conversation' meaning that it doesn't matter too much where an individual is placed in the box (unless they are in the worst part!) because the conversation has been enabled.

Ryan's three tips for having conversations in an organisation consisting of 10,000 people are:

1. Make it simple
2. Make it cultural.
3. Create role models – cascading down.

It is argued that these methods reduce time-taken - which is the main obstacle for managers.

The company's values were written down in 1989 and have remained unchanged. Although he did not initially see the need for the values to be shown as a poster in a staff room... sooner or later this did occur! But it had 'got to the stage where the communication mechanism' needed to change, and the poster worked with 6 headings to capture what great leadership looks like: Ambitious; Authentic; Honest; Inspiring; Empowering; Supportive.

## Delegate activities and discussions: How does HR help or hinder the line? How can HR support the line more effectively? *Wendy Hirsh and Sharon Varney facilitate*

First of all, tables were assigned roles that they should adopt (Senior Manager, Line Managers, HR, and Employees) and then asked how they would describe what their HR function is and what they would like it to be in one word.

Senior Manager: HR function is: distant; would like HR function to be: enabling.

HR: HR function is: reactive; would like HR function to be: proactive.

LM's: HR function is: irrelevant/ confusing; would like HR function to be: proactive/ consistent.

Employees: HR function: helpful and distant (no consensus here, focus on process?); would like HR function is to be: a people champion.

Secondly, delegates were asked to put themselves in the shoes of a line manager and asked: a) which people management issues, processes or situations are most difficult for you?; b) what do you most need from HR to help you manage those issues, processes or situations more effectively?

### Most difficult:

- The tools were considered difficult, as the processes were not seen to be hard – the tools are there, but there is not the know-how of how to use them.

- How do LM's gain the confidence to use the processes available? Is there no chance for ownership of the process?
- Why is it that LM's seem to be uncomfortable in giving direction?
- Should there be more distinction between policy and process?
- Dealing with poor performance.
- Passing on leadership communications when you have had no part in the process.
- Dealing with difficult people.
- Being the person who will be legally challenged in a dispute or tribunal and feeling vulnerable and unsupported.
- Having to let good people go in restructuring.
- Working with rather than against line managers. Line managers want someone who has been there and seen and done it so they can talk it through with them.
- Reposition the role of the LM – see the value of the role as 'time well spent', by providing training and a holistic overview of being a people manager; bring back the 'human side' when HR is seen to have lost the term 'people management' which is very real from the LM's point of view.
- Choosing managers carefully. Selecting people who can do the difficult job of line management.
- Quite a lengthy debate over helping managers to be change interpreters by simplifying language and not using HR jargon.
- HR may have lost a sense of credibility, therefore getting the basics right and engaging more with LM's would be a good step forward (Wendy: think of managers as customers rather than treating them like idiots).
- Focus should not just be about what LM's want, but about what they might need ie, helping in field of recruitment selection and assessment; increasing emphasis on supporting people.

## What HR can do?

- We have to step back and ask if know what managers want and do we make life easier or harder?
- We need to focus on selection and recruitment to help line managers get the right people in the door.
- Need to build capability of the line manager especially the softer skills and resilience. And we need to deal with their needs not just their wants.
- Need to give detailed and rigorous training on recruitment and selection for managers.
- HR needs to show its business value.
- HR needs to move away from HR jargon.
- HR should also be clear and simple - they should move away from endless documentation.
- HR need to get the basics right; What do customers (line managers and employees) actually want; Do we make the lives of line managers easier; Make sure that the here and now is right, tomorrow has no credibility - 'Good HR is common sense'.

Finally, delegates were asked to once more, put their HR hat back on and think about a) (in pairs) one thing they might personally do differently to support line managers more effectively; b) (in a group) what two things HR can do to support line managers more.

## Some ideas from the audience:

- Visibility of HR. People don't know who their line managers are.

Wendy: The biggest gap is between what LM and HR thought about recruitment: HR thought of as dull; LM as most strategic thing to deal with. Irony that if don't get the right person in, HR can often make it harder for them to get out again!

Sharon: Aware that deep discussions needed to get to this list, but at the same time it does look a lot like common sense... 'easier to say than do' and need to spend more time in day job thinking about it in order to put it into practice.

Feel sorry for the HR function which has become 'so strategic they're about to join god' – HR not coming out as being very facilitative as 'a friend', someone who coaches and supports.

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## About IES

IES is an independent, apolitical, international centre of research and consultancy in human resource issues.

IES aims to help bring about sustainable improvements in employment policy and human resource management. We achieve this by increasing the understanding and improving the practice of key decision makers in policy bodies and employing organisations.

We believe that HR can make a significant impact on the success of organisations of all types. In order to help bring this about, we help organisations:

- decide what they want HR to achieve

- identify what high performing HR people are like
- design and deliver bespoke development programmes for HR people
- evaluate how they are progressing against their goals

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