

Introduction to Supervision and Leadership : Supervision and Leadership

Lesson 1 Overview

As a supervisor, your main purposes are to oversee the work that others do and manage your team. You'll find supervisors in a variety of industrial areas. There are key skills required for success. These skills include planning, monitoring, and coaching. You'll also interact with your line-level employees up to the plant or operations manager.

Supervisors can face many challenges. These challenges may include managing your former peers and managing your time so you can meet your goals.

To be a successful supervisor, you'll need to learn how to motivate your team while managing them.

1.1 Define the role of the supervisor, including key tasks and skills required to be successful

The Supervisor Role

READING ASSIGNMENT

The supervisor plays a significant role in company operations. A *supervisor* is someone who manages and oversees the work of others. Supervisors work in many industrial settings.

Supervising is more than telling others what to do or watching them work. Good supervisors excel at planning, managing resources, and coaching their teams.

Skills of Successful Supervisors

Supervisors require some key skills to be successful. These include planning,

monitoring, and coaching.

Planning

An image of a supervisor and worker discussing a plan.



As a supervisor, you need to properly plan to be successful.

As a supervisor, you need to plan what tasks to complete on your shift based on the larger goals of the company. Let's say you're a supervisor in a department that produces door panels for a car parts supplier. You'll have many production goals for your shift. However, your planning must focus on the company's larger goal: supplying quality parts to your customer on time.

There will be operations in your own department that work separately from one another. However, they all rely on one another to perform their specific tasks.

EXAMPLE

Your department makes car door panels that are shipped directly to the car company for production. In your department's final phase, one area makes an insert that's added to complete the assembly. The inserts are made in an area of your department that cuts vinyl and cotton rolls into the proper shapes and sizes. Then the materials are embossed together to make the insert. As the supervisor,

you need to ensure that the insert team has the right balance of vinyl and cloth pieces. If there's too much of one and not enough of the other, insert production will stop. If insert production stops, you risk stopping the final door assembly. This means there won't be enough door panels to ship to your customer. If that happens, it may force your customer to stop production.

Production shutdowns like the one in this example cost money. A typical automotive plant has about 3,000 employees on a shift. If each employee makes \$20 per hour, that's a labor cost of \$60,000 per hour, or \$1,000 per minute. Improper planning that causes production to stop for five minutes costs your customer \$5,000 in labor. However, the lost time will likely be made up at overtime pay rates. This means it really costs the customer \$7,500. This won't make your customer happy.

Monitoring

Great supervisors don't just make a great plan, they also monitor the plan. This keeps work on track and ensures that the team meets company goals.

EXAMPLE

Part way through your shift, you may find that half of your department is lagging behind the other half. Maybe you need to reassign people to different roles to get things back in balance. Maybe sending one group to break early is enough to correct the problem. Or perhaps you could have people stagger their break times to make things right. The point is, problems with the plan will happen. You need to keep track of progress and make changes when they're needed.

In addition to monitoring your plan, you also need to monitor your people. Do certain people work well together? Do some people lack certain skills? Is anyone ready to move into a leadership role? Be sure to make time for positive coaching and personal contact with your employees. When you need their help, they'll be more likely to give it. It can also make it easier to have difficult conversations with your workers.

Coaching

For supervisors, coaching can be both positive and negative. Too often, coaching is only looked at as a negative. You need to positively engage with your employees

every day. Take the time to point out their successes and areas where they've improved.

EXAMPLE

Suppose you supervise a team of heating, ventilation, and air conditioning (HVAC) field technicians. A common problem with air conditioning (A/C) units is that they fail to start up after the winter. This is often because the run/start capacitor is bad and must be replaced. Because this is a common problem, your technicians keep several of these parts in their vans.

One of your technicians had several calls one morning where each customer needed a new run/start capacitor. Near the end of the technician's shift, yet another customer also needed one. However, the technician had used all his or her supply earlier in the day. The technician called a nearby team member to see if he happened to have a capacitor in stock. Sure enough, your technician was able to get the part and made the repair that day. The customer was thankful and highly satisfied with the service she received from your technician. As the supervisor, recognizing the technician for going above and beyond is an excellent chance for a positive coaching talk.

However, there will be times where you'll have to coach for negative reasons. Maybe one of your technicians mixed up the A/C wires and shorted out a customer's system. As a result, the company had to pay for these damages. This type of mistake will likely result in disciplinary action. As the supervisor, you'll be the one handing out the discipline.

Keep in mind that, although discipline is often a negative event, you should use it to get a positive result. This is a chance to make sure the technician received the proper training prior to going on the call. If not, you could assign that training to the technician. You could assign the technician some refresher training to make sure he or she understands what to do in the future. Make sure the technician leaves the discipline process knowing that you care about his or her success. Let the technician know that you want to help improve his or her performance and avoid future problems.

Daily Tasks for Supervisors

Every day there will be regular tasks that you need to perform. These include taking

attendance, writing reports, and issuing discipline.

Attendance

The first thing you'll do at the start of your shift is take attendance. What if an emergency leads to a building evacuation? In this case, you're responsible for making sure that all your workers got out safely. Accuracy is vital as you don't want to send an emergency responder in to find someone who didn't come to work that day, nor do you want to report that everyone is out when that may not be the case.

Your employees are earning hourly wages. Accurate attendance records are essential so they're paid correctly. All absences need to be entered into the company's timekeeping system (TKS). This also applies to vacation days, sick days, and holiday/overtime pay.

An image of a manager writing report at construction site.



Report writing is a large part of a supervisor's job.

Attendance records are also important so you can plan the work for the shift. This helps you determine if overtime is needed to cover absences. Say you're a warehouse supervisor. You find that absences on a particular day are going to leave you shorthanded on the receiving dock. When this happens, you should check the receiving schedule for the day. If it's a busy day in receiving, action should be taken. You can call employees scheduled for the next shift and ask them

to come in early. Perhaps you can move people out of other areas to cover the shortage. Maybe you could borrow an employee from put-away for a short time. This makes sense because if you're unable to unload at receiving, there won't be anything to put away. Once everything is unloaded, you can then schedule overtime to get everything put away.

Report Writing

Each day, you must submit reports to management showing what was done on your shift. The types of reports will vary depending on the industry you're in. If you're a production supervisor, your reports will detail what processes were run, how many units were made, and how many labor hours it took. You also need to report any maintenance issues and explain any machinery downtime. Also, anything out of the ordinary should be reported.

Discipline and Documentation

There will be times where you'll have to discipline an employee. Your human resources department should have a formal procedure for how to issue a disciplinary action. However, you'll be the one to issue it. You're also responsible for the record keeping needed to justify the action taken.

EXAMPLE

As an HVAC supervisor, you have an employee who doesn't complete his or her parts usage paperwork for every job. You should document these incidents and keep the records. That way, when the time comes to discipline the employee, you have the proper notes to justify your actions.

Resource Management

As a supervisor, you must efficiently use all available resources to meet company goals. In addition, you're a liaison between employees and operations management.

As a supervisor, you'll manage multiple resources including labor, materials, and equipment. When managing these resources, you need to manage for the present and the future. How you plan for your shift and the results you achieve directly

affects the shifts that follow. You need to be aware of this so the next shift is set up for success.

EXAMPLE

Suppose you're a warehouse supervisor that oversees both shipping and receiving operations. Goods are received and put away in the warehouse awaiting customer orders. There's also a cycle count program. This is where the warehouse bins are counted and checked against the material requirements planning (MRP) system for accuracy.

You need to balance unloading and putting away goods with timely cycle counting and loading customer orders. Focusing on getting the goods unloaded and the customer orders pulled and loaded can cause problems. This leaves a gap where the unloaded goods aren't put away properly. The next shift also has to pull customer orders. If the product isn't put away correctly during your shift, the next shift won't know where to pull the orders to get them loaded.

The result is that even though you posted high-efficiency numbers for your shift, you caused problems for the next shift. Now, you run the risk of your customers' orders not shipping out on time. This is why it's important to plan your operations for your own shift as well as for the shifts that follow. Doing this will set your own team up for success, along with other teams, and ultimately, the company.

Materials

Materials include both raw and work-in-process (WIP) materials. Depending on your role, you may manage either one or both. Be aware that WIP materials are subject to value-added processes and are of no value to the end customer. Therefore, it's critical that you understand how WIP materials contribute to operational efficiency.

Equipment

Equipment is the machinery used to perform the value-added processes on your materials. Each piece of machinery runs at different rates which can lead to bottlenecks. A *bottleneck* is the slowest part of an operation, typically resulting in the delay of all other processes. Knowing which pieces of equipment are your bottlenecks is key to managing an efficient operation.

Labor

Labor refers to the workers involved in your process. Some workers perform value-added tasks. Others are in charge of operating the equipment or performing quality checks. It's important to place the right people at the right places in each process. As the supervisor, you must recognize which tasks are best done by individuals and which are best done by working in teams. You must also be able to create effective teams made up of people who work well together.

Planning and Process Knowledge

Knowledge of your process and the ability to plan are key to your success as a supervisor. You must identify the processes that bring the most value to the company and where the bottlenecks are. It's also critical to recognize your workers' skills and abilities and what motivates them. You must balance time spent with your workers and managing the process with time spent preparing your daily reports.

It's good planning practice to arrive early for your shift to prepare for the day ahead. Asking yourself these types of questions may help:

- Is there a raw material you're out of that will prevent a machine from being loaded?
- Is there too much work in process (WIP), that is, work that was started on a shift but was unable to be completed? If so, that would require you to focus heavily on downstream operations to bring the WIP level back in balance.
- Are there machinery issues?
- Did any of your workers call in sick?
- Are there any customer priorities that require special attention during your shift?

An image of a supervisor working on planning and process.



Effective planning and understanding processes will make you a successful supervisor.

Having process knowledge helps you recognize that managing the efficiency of the current day's activities prepares you and your teams for future success. Again, asking yourself these types of questions may help:

- Did you leave the right amount of WIP on the floor?
- Is the machinery prepped and ready to go for the next shift?
- Are the correct upstream processes running to support the downstream processes that need them?

Each process in your operation should have a *Standard Operating Procedure (SOP)* written for it. An SOP defines in detail all of the necessary steps in a process and how to perform them. As the supervisor, you should create SOPs for each process or assemble a team to do so. Using an SOP leads to a more consistent finished product and helps you figure out why defects sometimes happen.

Key Points and Links

READING ASSIGNMENT

Key Points

- Supervisors don't just watch people work and tell them what to do. Good supervisors excel at planning, managing resources, and coaching their teams.
- When you plan work as a supervisor, you should keep the company's goals in mind. These goals may include quality, customer service, or cost.
- You can't just make a plan. You also should monitor the plan to ensure the plan's goals are achieved. This may require adjusting as the situation changes, such as moving people to other roles or changing break times.

- Coaching is not just a code word for negative feedback. Coaching should be positive and negative so your workers know what they do well and what they need to improve.
- Supervisors' daily tasks include taking attendance, writing reports, and giving discipline.
- Supervisors not only have to manage resources well, they also should be a liaison between employees and managers.
- As a supervisor, you need to manage labor, materials, and equipment for today's shift and for the future.
- Knowing your process and where bottlenecks are likely to happen are critical to keeping things running smoothly.

Discover More: The Supervisor's Role

Fill in the blank.

1. Supervisors require some skills to be successful, including planning, monitoring, and _____.
2. Supervisors should not only monitor their plan, but also their _____.
3. You should take attendance at the _____ of every shift.
4. Attendance records are important to determine if _____ is needed.
5. Materials include both _____ and work-in-progress materials.

Respond to the following based on your reading.

6. What's a bottleneck?
7. What should be written for each process in your operations?

Discover More Answer Key:

Discover More: The Supervisor's Role

1. coaching
2. people
3. start
4. overtime
5. raw
6. A bottleneck is the slowest part of an operation.
7. Standard Operating Procedures

1.2 Identify key employee roles and job titles used in various industrial settings

Employee Roles and Titles

READING ASSIGNMENT

Effectively interacting with employees in different roles and job titles is crucial. You should work to build strong relationships with the people in these other roles. When you do, you have a better chance of hitting your department's goals and the larger goals of the business.

Supervisor Interactions

As a supervisor, you interact with people in many positions. These people must all work together and focus on meeting the company's goals. Some of these key people include the

- Plant or operations manager
- Production (or warehouse) manager
- Maintenance manager
- Scheduler (or planner)
- Materials manager
- Lead operator
- Human resources department

Plant/Operations Manager

An image of a senior plant manager talking to young assistant writing down instructions.



As a supervisor, you need to interact with other roles in your company.

One person oversees your facility's total operation. This is true whether you're a production, warehouse, or heating, ventilation, and air conditioning (HVAC) supervisor. The *plant manager* oversees the entire facility and what goes on inside it. This role is sometimes called the operations manager. Every department and function reports to this person. This includes safety, quality, production, finance, human resources, maintenance, materials, planning, and shipping.

The plant manager sets the culture for the operation. This person makes the rules about acceptable behaviors. The plant manager also decides which parts of the business are the main focus points. The plant manager also reports the facility's results to upper management.

As a supervisor, you wouldn't report directly to the plant manager. However, you'll still interact with this person in production meetings, on project assignments, and during weekly department meetings.

Production/Warehouse Manager

The *production manager* oversees all production operations. This person is also called the *warehouse manager*. This is the person a supervisor directly reports to. This includes HVAC supervisors, although the manager's title may be field manager.

The production manager ensures that the production in the business runs smoothly. This person receives your daily reports and will help keep you focused on company goals.

Maintenance Manager

The *maintenance manager* ensures that everything in the facility is in good working order. As a supervisor, you may need to report issues to maintenance.

As a production supervisor, this includes reporting machinery that's not working as it should. This may also entail prepping machinery for the maintenance technicians to work on. As a warehouse supervisor, this may include mobile equipment or racking that needs repair. As an HVAC supervisor, this includes your technicians' equipment that needs to be adjusted or reset. It may even be working on the service vans.

Scheduler/Planner

The *planner* owns the master operations calendar. This person is sometimes called the *scheduler*. As a supervisor, this calendar is your roadmap for your shifts.

A production/warehouse supervisor monitors the delivery and shipment schedules. It's possible that the scheduler may schedule more deliveries in a day than can be unloaded. You'll need to communicate this to the scheduler and work as a team to resolve the issue.

In the HVAC field, there's a list of service calls for you to dispatch. These may already be in optimal order. If not, you may need to use your experience to decide the best way to dispatch your crew.

Production supervisors are given a list of priorities from the scheduler. This is so that if problems arise, the highest priority items don't fall behind. Production schedules are often shared across departments. Most likely, another department supplies yours. If the other department isn't following the proper schedule, it can cause your department to have to shut down.

Materials Manager

The *materials manager* oversees all the company's materials. As a supervisor, you must ensure that the proper materials are used. If not, you should document any

deviations for the materials manager.

EXAMPLE

As an HVAC supervisor, your technicians carry a supply of commonly used parts. You need to complete the proper documentation listing what gets used out in the field. The materials manager and the purchasing group won't know to reorder these parts if you don't report their use.

As a warehouse supervisor, you may receive damaged or defective goods. These need to be reported so they can be replaced and credited.

Production supervisors need to make sure that the right materials are being used in the proper quantities. This is for inventory purposes as well as for quality purposes. In addition, all production scrap needs to be reported to the materials group.

Lead Operator

Some companies use *lead operators* on their teams. Lead operators aren't supervisors. However, they are workers with expert knowledge of the department. Lead operators can assist in making decisions in your absence.

Human Resources

The duties of *human resources* include benefits management, record keeping, and other employee services. These other services include performance appraisals, training, recruiting, compensation, and employee relations. As a supervisor, you'll assist human resources with record keeping. This includes records of any disciplinary actions and performance appraisals. You should also refer your employees to human resources for assistance with the other areas listed.

Key Points and Links

READING ASSIGNMENT

Key Points

- Supervisors must be able to work with both workers and managers in many different roles. Building strong relationships with others improves your ability to achieve success.

- The plant or operations manager is the person in charge of the entire facility and what goes on inside it. This person sets the culture, makes the rules, and decides the focus.
- The production or warehouse manager oversees all production operations. As a manager, this is the person you will likely report to. This person may also be called a field manager.
- The maintenance manager makes sure everything in the facility is in good working order. This is who you should report maintenance issues to.
- The scheduler or planner owns the master operations calendar. This is the calendar you will use to plan your shifts or service calls.
- The materials manager oversees all the company's materials. You must ensure you use the correct materials and document any materials issues.
- Lead operators are expert workers on their teams.
- Human resources oversees benefits and other employee services. You will need to assist human resources by keeping records of disciplinary actions and performance reviews.

Discover More: Key Employee Roles and Job Titles

Fill in the blank.

1. The _____ is in charge of the entire facility.
2. The duties of _____ involve employee compensation and benefits.
3. The job of the _____ is to ensure everything in the facility is in working order.
4. The plant manager sets the _____ of the organization.
5. The plant manager reports the operation's results to _____.

Respond to the following based on your reading.

6. Who owns the master operations calendar?
7. As a supervisor, how will you assist human resources?

Discover More Answer Key:

Discover More: Key Employee Roles and Job Titles

1. plant manager
2. human resources (HR)
3. maintenance manager
4. culture

5. upper management
6. The scheduler or planner owns the master operations calendar.
7. You will assist with record keeping in regards to any disciplinary actions and performance appraisals.

1.3 Identify the challenges of becoming a supervisor to your coworkers

Supervisory Challenges

READING ASSIGNMENT

Challenges come with your supervisor position. This is true whether you're a new supervisor or if you've been one for a while. You must manage relationships, excel in both stress and time management, and always think of ways to do more with less. And you must do all of this while keeping your focus on the company's goals.

The Shift to Supervising

Taking on a supervisory role for the first time carries new challenges. These may seem overwhelming at first. This is true whether you're a production supervisor; warehouse supervisor; or in the heating, ventilation, and air conditioning (HVAC) or maintenance fields. One of these challenges is the adjustment in your daily routine. Another is that you're now responsible for an entire team of people instead of just yourself.

The adjustment to managing people and processes—and not just performing tasks—is a big one. In addition, you may experience difficulties when you move from being a coworker to being a superior. It's tough to gain respect while keeping the positive personal relationships you had before. It's important to remember that you are now a role model in the organization. Your actions affect all employees, even those not under your direct supervision.

The change from focusing on personal productivity to managing others is hard for some new supervisors. You'll have concerns about your usefulness since you're no longer producing a physical product. Remember that your productivity now comes from being an effective leader. You'll now need to focus on time management, stress management, relationship management, and acquiring leadership skills.

You're now the one in charge of your team's success. You need to make sure your goals and objectives are clear. Often, it's not obvious to your team members how their work affects the company's success. Your job is to help them make that connection.

FIRST-TIME SUPERVISORS

A promotion to supervisor or manager is exciting. It also brings new challenges. [Officevibe](http://www.officevibe.com/blog/challenges-first-time-managers) (www.officevibe.com/blog/challenges-first-time-managers) lists 10 challenges many new supervisors will face and suggestions for making the best of it.

Pressures Supervisors Face

As a supervisor, you'll face stressful situations. Supervisors are responsible for overall operations. Whether you're in production, the warehouse, or HVAC, your employees are the ones doing the work. They're delivering the products or services to your customers. What happens on your shift—good or bad—is your responsibility.

Supervisors work long hours. As a supervisor, you're expected to arrive early to prepare for the day. You'll also likely need to stay after the shift to finish your reports for management.

Supervisors must also deal with high employee turnover. Entry-level employees leave their jobs often. Because of this, you may constantly be hiring and training new workers. This constant change can make it difficult to implement process improvements.

Finally, supervisors are under constant pressure to do more with less. Every year, companies set new goals and objectives. Often, these goals directly relate to operational efficiencies. If you're in production, you may be asked to improve your pieces-per-man-hour rates. HVAC supervisors may see an increase in the number of service calls per day, with fewer technicians to make the calls. And a warehouse supervisor may have to find a way to improve the picks made per hour.

Challenges of Supervising Coworkers

Supervisors face many challenges, especially when it comes to their coworkers.

Maybe you were previously a team member but are now the supervisor. If so, it's important to set boundaries right away.

Unfortunately, you don't have the freedom to be as open as you were in the past. Some of your former coworkers may take advantage of your friendship. They may think that because you're friends, they won't get in trouble for coming in late. They may also think it's fine if they don't meet their productivity goals. You must establish that previously unacceptable behaviors still aren't allowed.

However, you also need to use your past relationships to achieve results. This even applies to any employees with whom you were friendly before but who have now turned a cold shoulder to you. You likely shared complaints about the way your department was run before you were the supervisor. You can remind these workers of this. Let them know that you can do something about the issues. Encourage these people to share their good ideas.

FRIENDS AT WORK

Dealing with close friends at work can be complicated at the best of times. This is especially true if it's your job to supervise them. When you become the supervisor of your peers, it can be awkward. Read [Navigating the Transition from Friend to Boss](http://hbr.org/2015/02/navigating-the-transition-from-friend-to-boss) (hbr.org/2015/02/navigating-the-transition-from-friend-to-boss) and [How to be the boss when your co-workers are your friends](http://beta.theglobeandmail.com/report-on-business/careers/leadership-lab/seven-steps-to-ease-the-transition-from-friend-to-boss/article16452904/?ref=www.theglobeandmail.com&) (beta.theglobeandmail.com/report-on-business/careers/leadership-lab/seven-steps-to-ease-the-transition-from-friend-to-boss/article16452904/?ref=www.theglobeandmail.com&) to learn some steps for handling this transition.

It's true that people's personal schedules and the business schedule won't always align. Your workers will request vacation days, which you're in charge of approving. But before approving any vacations, you must consider business needs. Some considerations are:

- Will there be enough staff to run the operation if you approve a vacation request?
- Does the person requesting time off have a specific skill, and is his or her backup already on vacation?
- Is the request for a busy time of year and is everyone required to help?

Unfortunately, there may be times when you may need to deny a vacation

request. Not all issues, however, involve approving vacation time. Sometimes, when workers are on vacation, you may need to make adjustments. You may need to move other workers into different roles for a short time to ensure that everything gets done. Cross-training your employees on different job functions makes this much easier. And there are other benefits to cross-training.

Image of a supervisor discussing scheduling with warehouse workers.



As a new supervisor, you may need to transition from a peer to a leadership role.

Sometimes customer demand forces the business to focus more work on certain areas and less on others. Having a well-trained staff makes this easier, but be prepared for some resistance. After all, your workers want to do the jobs they're most comfortable with. Be prepared to explain why the short-term move is needed and how much you appreciate each worker for helping.

Challenges of Time Management

Time management is very important in your supervisory role. You need to spend time with your direct reports. You also need to interact with and complete projects for the operations management team.

Consider what would happen if you spent your entire shift in your office. Would you know if your team is meeting its goals? Would you be able to make a good decision

to change something in the middle of the shift? Almost certainly not. And the opposite is true about reporting your results to your managers. If you're always out on the production or warehouse floor, or on a maintenance site, how can you write those reports? You need good time management skills to achieve balance between these responsibilities.

Keeping the company's big picture in focus isn't always easy. Sometimes your team must perform different tasks to set up the teams that follow. This means that, on paper, it looks like your team didn't meet its daily production goals. This may also mean that you won't get credit for completing anything.

There will also be mechanical failures, larger-scale supply chain issues, or absenteeism. For any of these issues, you may be called upon to get things back on track.

Perhaps a mechanical failure upstream caused all the WIP materials to run out. Now, you have nothing to run your downstream processes. To meet the big-picture goal, you need to get the process back in sync. In times like these, communicating the organization's big-picture goals to your team is important. The workers should get why you're not producing any finished product and that it's not their fault.

Key Points and Links

READING ASSIGNMENT

Key Points

- Being a supervisor can be difficult. You'll have many duties and must always find ways to do more with less. These challenges can be overwhelming at first, but you can work through them.
- You'll have a different day managing people and processes than you did when you were only responsible for yourself and your tasks. This adjustment can be hard in the beginning.
- Adjusting to managing former coworkers is also challenging. It will be important for you to set boundaries to avoid anyone trying to take advantage. You'll also want to use those relationships to build good teams and achieve results.
- Supervisors face many pressures. These include more responsibilities, long hours, high employee turnover, and pressure to perform with less.
- Managing time is critical for supervisors. You need to make time to interact with your team and as well as managers. You'll also need to be able to write reports and complete other projects.

- Keeping the company's big picture in focus isn't always easy, but it's important.

Links

- [Navigating the Transition from Friend to Boss](http://hbr.org/2015/02/navigating-the-transition-from-friend-to-boss) (hbr.org/2015/02/navigating-the-transition-from-friend-to-boss)
- [Seven Steps to Ease the Transition from Friend to Boss](http://beta.theglobeandmail.com/report-on-business/careers/leadership-lab/seven-steps-to-ease-the-transition-from-friend-to-boss/article16452904/?ref=www.theglobeandmail.com&) (beta.theglobeandmail.com/report-on-business/careers/leadership-lab/seven-steps-to-ease-the-transition-from-friend-to-boss/article16452904/?ref=www.theglobeandmail.com&)
- [10 Challenges that Every First-Time Manager Will Face](http://www.officevibe.com/blog/challenges-first-time-managers) (www.officevibe.com/blog/challenges-first-time-managers)

Discover More: Supervisor Challenges

Fill in the blank.

1. One possible challenge for new supervisors is that they usually work _____ hours.
2. Supervisors are under constant pressure to do more with _____.
3. Time _____ is very important as a supervisor.
4. When you become supervisor of a group of former _____, it can be awkward at first.
5. If you're a member of a team who is promoted to a supervisor, you should immediately set _____.

Respond to the following based on your reading.

6. In terms of skills, what should you consider when an employee asks for vacation time off from work?
7. In terms of time of year, what should you consider when an employee asks for vacation time off from work?

Discover More Answer Key:

Discover More: Supervisor Challenges

1. long
2. less
3. management

4. peers
5. boundaries
6. You should consider if that employee has a specific skill and a backup person to perform it.
7. You should consider if it's a particularly busy time of year.

1.4 Define the qualities of good leadership

Qualities of Good Leadership

READING ASSIGNMENT

Leadership is using your influence to motivate employees to achieve business goals. Leadership is creating a shared culture and values. It's also communicating goals to your people and getting them to perform at a high level.

Being a good supervisor isn't just about setting schedules and telling people what to do. Successful supervisors are good leaders. The more leadership qualities you can add into your working style, the more successful you'll be.

LEADERSHIP STYLES

You should choose a leadership style that suits your working environment. Read [Leadership Styles](https://guides.wsj.com/management/developing-a-leadership-style/how-to-develop-a-leadership-style/) (guides.wsj.com/management/developing-a-leadership-style/how-to-develop-a-leadership-style/) to see six options and find the one you relate to most.

General Leadership Skills

A supervisor's job is complex and requires a wide range of skills. There are three sets of skills that are necessary for any supervisor. These include conceptual skills, human skills, and technical skills.

Conceptual Skills

Conceptual skills are when you can see the company's big picture. You can see how each department is interrelated. It's also clear to you how your team's daily goals help meet both department and company goals.

Developing your conceptual skills is directly related to strategic thinking. A production supervisor might ask, "How is what I'm doing today setting us up for success tomorrow?" A warehouse supervisor might ask, "How does the way we unload and put away deliveries affect the next crew that prepares the shipment?" As a heating, ventilation, and air conditioning (HVAC) supervisor, your question might be, "Are we giving the right information to customer service to follow up with customers and earn repeat business?"

Human Skills

Having *human skills* means that you work well with other people and groups. You demonstrate these skills in the way you relate to other people. You need to be able to motivate, manage conflict, lead, coordinate, and communicate. You also need to encourage your employees to express their ideas. When they do, you must protect them from ridicule. If your employees feel they'll be made fun of for offering a poor idea, it's unlikely they'll offer any. Motivated and engaged workers help the business grow and expand.

Technical Skills

Technical skills mean that you understand and are skilled at performing specific tasks. This includes mastery of the methods, techniques, and equipment used in specific functions. It also includes specialized knowledge that relates to your department. These skills are critical for a supervisor, as you'll direct the activities needing these skills.

SOFT SKILLS FOR SUCCESSFUL LEADERS

Human skills are also called soft skills or interpersonal skills. There are many of these to master. Read [19 soft skills every leader needs to be successful](http://www.businessinsider.com/soft-skills-leaders-need-for-success-2016-4/%23-1) (www.businessinsider.com/soft-skills-leaders-need-for-success-2016-4/%23-1) to see which ones you need to work on.

An image of a supervisor explaining equipment to trainee.



Your conceptual skills, human skills, and technical skills will make you a successful supervisor.

A warehouse supervisor needs to know how industrial equipment works and its limitations. An HVAC supervisor needs to know how the common tools and gauges work. The supervisor must also help with questions that come up while technicians are in the field. A production supervisor needs technical knowledge of the industry. In a chemical plant, this is knowing chemicals and the reactions they cause. In an automotive plant, this is knowing the tools and equipment used in the department.

Leadership Skills for Supervisors

There are several skills required for good supervisory leadership. Here are a few of the areas that are important for you:

- **Connecting.** A good leader can connect with his or her employees. Good leaders understand their employees' needs and what motivates them. For example, some workers enjoy training and helping others. Other workers prefer working alone. Some want to take on more responsibility. Connecting with your employees helps you lead them as a team and as individuals.
- **Communication.** You must be able to communicate information to your direct reports. You need to help them get the bigger picture. You must also communicate up to operations management to convey the issues and

successes your team is having. You should tell your workers what's going on within the company now. You should also prepare them for what's coming. For example, you know that large customer orders are due soon, which requires working a few weekends. You should let your workers know this as far in advance as possible. If your team doesn't typically work weekends, workers may need to plan to cover shifts.

- **Collaboration.** Asking team members for input helps you get the best ideas to succeed. The more input people can share about a process, the more they care and want it to succeed. Also, asking for more input generates better ideas. Many of your employees are experts at the jobs that they do. Knowing that, wouldn't you think that they'd come up with some good ideas? Of course!
- **Coaching.** There are two different aspects to coaching. One is to coach by correcting mistakes. The other is to coach for development and future promotion. People make mistakes. It's your job as supervisor to help them learn from their mistakes. You also want to help them solve problems so they can improve. Through coaching, you learn what your workers are good at and where they can improve. With this knowledge, you can put them in positions to be successful. And on another note, although you're already a leader, you also need to be coachable.
- **Consistency.** As a supervisor, consistency is key. Policies and standards must be applied consistently across the operation. Workers won't respect a leader that has different rules for different people. In addition, being consistent allows you to connect best practices with all the company's workers.
- **Continuous improvement.** Continuous improvement involves finding ways to make the business better each day. You may collaborate with your team and come up with good ideas, but the real goal is to implement these ideas to make workers' jobs and processes better.
- **Celebration.** Finally, you should celebrate your team's successes and recognize those responsible. When your team achieves something big, make a big deal about it. Bring the plant manager down to meet the team and join in the celebration.

WHAT MAKES A GREAT LEADER?

A great leader displays many qualities that should make employees look up to and respect him or her. Read [11 Powerful Traits Of Successful Leaders](http://www.forbes.com/sites/deeppatel/2017/03/22/11-powerful-traits-of-successful-leaders/#7a7392aa469f) (www.forbes.com/sites/deeppatel/2017/03/22/11-powerful-traits-of-successful-leaders/#7a7392aa469f) to learn about the qualities that good leaders have.

Key Points and Links

READING ASSIGNMENT

Key Points

- Successful supervisors are good leaders. You'll need to use your leadership skills to motivate employees to achieve success. You'll also need to create a good culture and communicate key goals.
- Supervisors need three main skills—conceptual skills, human skills, and technical skills.
- Conceptual skills allow you to see the company's big picture and how everything works together. They also let you stay focused on strategy.
- Human skills are the skills that help you work well with others. How you relate to others, talk with them, and lead them are all part of your human skills.
- Technical skills are task-related skills. These skills allow you to understand how tasks should be done and the tools and techniques your teams should be using.
- Important leadership skills include connecting, communicating, collaborating, and coaching. You should also be consistent and strive for continuous improvement. Finally, celebrate when things go well.

Links

- [Leadership Styles](http://guides.wsj.com/management/developing-a-leadership-style/how-to-develop-a-leadership-style/) (guides.wsj.com/management/developing-a-leadership-style/how-to-develop-a-leadership-style/)
- [11 Powerful Traits Of Successful Leaders](http://www.forbes.com/sites/deeppatel/2017/03/22/11-powerful-traits-of-successful-leaders/#7a7392aa469f) (www.forbes.com/sites/deeppatel/2017/03/22/11-powerful-traits-of-successful-leaders/#7a7392aa469f)
- [19 soft skills every leader needs to be successful](http://www.businessinsider.com/soft-skills-leaders-need-for-success-2016-4/%23-1) (www.businessinsider.com/soft-skills-leaders-need-for-success-2016-4/%23-1)

Discover More: Qualities of Good Leadership

Fill in the blank.

1. _____ is using your influence to motivate employees to achieve organizational goals.
2. Developing your conceptual skills is directly correlated to _____ thinking.
3. If you have _____ skills, you can work effectively with other people and with groups.
4. Technical skill means that you understand and are proficient in the performance of specific _____.
5. As a supervisor, you must be able to _____ information down to your employees.

Respond to the following based on your reading.

6. What are the two different aspects of coaching?
7. What does consistency mean in terms of a supervisor's skills?

Discover More Answer Key:

Discover More: Qualities of Good Leadership

1. Leadership
2. strategic
3. human
4. tasks
5. communicate
6. The two aspects of coaching are coaching employees through correcting mistakes and coaching for development for future promotion.
7. Consistency for a supervisor means applying policies and standards across the operation.

Lesson 1 Review

Self-Check

1. What's the first thing you should do at the start of your shift?
 - a. Check equipment.
 - b. Write your reports.
 - c. Take attendance.
 - d. Discipline any employees who have poor performance.

- 2.** Marianne is a supervisor, and she has made an operations plan for her team. What should she do to keep the plan on track?
- Create a backup plan.
 - Delegate to someone else.
 - Revise the plan.
 - Monitor the plan.
- 3.** Along with disciplining employees, what should supervisors do?
- Create a materials list.
 - Contact the legal department.
 - Document the discipline.
 - Terminate the employee.
- 4.** Vincent is a supervisor and has to have a meeting with Roberta, the person in charge of the plant's total operation. What's Roberta's role?
- Materials manager
 - Maintenance manager
 - Plant manager
 - Scheduler
- 5.** What are some job duties that a human resources employee might perform?
- Duties related to employee compensation, record keeping, and training
 - In charge of ensuring that everything in the plant is in good working order
 - Duties related to the master operations calendar
 - In charge of all of the materials related to the operation
- 6.** What job role in the plant is responsible for owning the master operations calendar?
- HR employee
 - Lead operator
 - Planner
 - Materials manager
- 7.** What's the job of the maintenance manager?
- Ensure the facility has enough materials for operation.
 - Provide employees with information on compensation and benefits.
 - Schedule employees for their shifts.
 - Ensure everything in the facility is in good working order.
- 8.** What time should a supervisor arrive at work?
- When he or she wants to
 - At least an hour before the shift
 - As the shift begins
 - At least ten minutes before the shift
- 9.** Jon is a new supervisor. What's one issue related to employee retention that he will likely face?

- a. Issues with the human resources department
 - b.
- Conflicts between employees who are leaving and those who are staying
- c. A high rate of turnover
 - d. Many employees who are retiring
- 10.** What should you, as a supervisor, consider when employees ask for time off?
- a. Can you work the person's shift?
 - b. Is there enough staff working to cover this shift?
 - c. Does the employee receive a high rate of pay?
 - d. Will the person be angry if you deny their vacation request?
- 11.** What does it mean to have strong conceptual skills?
- a. You're an understanding supervisor who helps your employees.
 - b. You can effectively deal with employee conflicts in a fair way.
 - c. You see the big picture of the organization and how the departments fit together.
 - d. You understand how the financial side of the business operates.
- 12.** Wendy is a supervisor who excels at understanding her employees and their needs and motivations. She has skills in what?
- a. Consistency
 - b. Communication
 - c. Connecting
 - d. Collaboration
- 13.** Which is an example of team collaboration?
- a. Email team members and ask their opinion on a problem.
 - b. Explain to the team that you'll be the final decision-maker on an issue.
 - c. Speak to team members as if you're on the same level as they are.
 - d. Celebrate with the team when they achieve a milestone.
- 14.** What should you do when your team succeeds?
- a. Do not do anything to call attention to it.
 - b. Celebrate with the team.
 - c. Give the team their next assignment.
 - d. Email your thanks to whoever led the team to the success.
- 15.** How does a supervisor demonstrate human skills?
- a. Proficiency in technical tasks
 - b. By strategic thinking
 - c. The way the supervisor relates to other people
 - d. By focusing solely on the daily goals of the team

Self-Check Answer Key

1. Take attendance.

Explanation: At the start of your supervisor shift, you should first take attendance. Accuracy in attendance is important in case there's an emergency and your employees have to evacuate. You'll need to account for everyone.

Reference: Section 1.1

2. Monitor the plan.

Explanation: Supervisors should monitor their plans to keep them on track and to ensure that they meet the larger goals of the operation. People should also be monitored.

Reference: Section 1.1

3. Document the discipline.

Explanation: Supervisors should be sure to keep documentation on any disciplining of employees. You should document these incidents and keep the records so that there's written justification for your actions.

Reference: Section 1.1

4. Plant manager

Explanation: Roberta is the plant manager, often called the operations manager. In her role, she oversees the total operation of the facility. She sets the culture for the organization.

Reference: Section 1.2

5. Duties related to employee compensation, record keeping, and training

Explanation: A human resources employee would be in charge of activities such as benefits administration, record keeping, and other employee services, as well as training, compensation, and employee relations.

Reference: Section 1.2

6. Planner

Explanation: The planner, or scheduler, is the person who owns the master operations calendar. This calendar is the blueprint for your shifts as a supervisor.

Reference: Section 1.2

7. Ensure everything in the facility is in good working order.

Explanation: The job of the maintenance manager is to ensure that everything in the facility is in good working order. The supervisor may have to report

issues to the maintenance manager.

Reference: Section 1.2

8. At least an hour before the shift

Explanation: Supervisors should arrive at work at least one hour before the shift begins. Often, supervisors will also have to stay after the shift ends to complete paperwork and reports and send them to upper management.

Reference: Section 1.3

9. A high rate of turnover

Explanation: Most likely, as a new supervisor, Jon will be supervising entry level employees. These types of employees typically have a high turnover rate.

Reference: Section 1.3

10. Is there enough staff working to cover this shift?

Explanation: One important consideration when employees request time off is the question of if there's enough staff to cover the person's time away. You'll also need to consider if the employee has a special skill set.

Reference: Section 1.3

11. You see the big picture of the organization and how the departments fit together.

Explanation: One skillset necessary for a successful supervisor is conceptual skills. This means the ability to see the organization as a whole, how the departments are interrelated, and how the daily goals and objectives of the team help accomplish departmental goals, as well as the larger goals of the operation.

Reference: Section 1.4

12. Connecting

Explanation: Wendy is good at connecting. This means that she understands her employees needs and their motivations. As a supervisor, connecting is a way to lead the team and individual team members, as well.

Reference: Section 1.4

13. Email team members and ask their opinion on a problem.

Explanation: Emailing team members for their opinions on an issue is an example of collaboration. Collaboration is an important skill for supervisors, because the more input team members have, the more invested they'll be in

the team and its goals.
Reference: Section 1.4

14. Celebrate with the team.

Explanation: When the team succeeds, you should celebrate the success and those who helped achieve it. When it's a big success, make a big deal out of it.

Reference: Section 1.4

15. The way the supervisor relates to other people

Explanation: A supervisor would demonstrate human skills by how he or she relates to other people. It's an important skill, and it means that the supervisor can work effectively with people and groups.

Reference: Section 1.4

Flash Cards

1. Term: Supervisor

Definition: Someone who manages, oversees, or supervises the work of others

2. Term: Bottleneck

Definition: The slowest part of an operation, typically resulting in the delay of all other processes while waiting for the bottleneck to be resolved

3. Term: Labor

Definition: The workers involved in your process

4. Term: Standard Operating Procedure (SOP)

Definition: Defines in detail all of the necessary steps in a process and how to perform them

5. Term: Plant Manager

Definition: Sometimes called the operations manager, this person is in charge of the entire facility and what goes on inside it

6. Term: Production Manager

Definition: Sometimes called the warehouse manager, this person oversees all production operations. The supervisor reports directly to the production manager.

7. Term: Maintenance Manager

Definition: Ensures that everything in the facility is in good working order

8. Term: Planner

Definition: Sometimes called the supervisor, this person owns the master operations calendar

9. Term: Materials Manager

Definition: Person in charge of all of the operation's materials

10. Term: Lead Operator

Definition: Utilized by some operations, this person is not a supervisor, but rather a worker with expert knowledge of the department and can usually assist in making decisions in your absence

11. Term: Human Resources (HR)

Definition: Department that handles benefits, administration, record keeping, and other employee services

12. Term: Time Management

Definition: Ability to effectively spend time with direct reports as well as interact with and complete projects for the operations management team

13. Term: Leadership

Definition: Using your influence to motivate employees to achieve organizational goals