



HR Toolkit

Setting Managers up for Success

**WILLOW &
PUDDIFOOT**

Creating happy, healthy, high-performing teams

Introduction

Practical tools and templates for HR and L&D leaders

When people are promoted into management, they're often expected to just "figure it out." But we know that doesn't work. Without clear expectations, support, or structure, even the most capable people can struggle.

This toolkit is here to help. It brings together eight practical resources that HR and L&D teams can use (and adapt) to strengthen how they define, develop, and support managers.

You can use this toolkit to:

- Build consistency across your manager population
- Improve how you onboard and support new managers
- Strengthen your case for investment in manager development
- Align your programmes with business goals

Whether you're refining your current approach or starting from scratch, these resources are designed to be simple, flexible, and ready to use.



What's inside

- 1 | Define the role of manager**
Craft a clear, business-relevant definition of the manager role in your organisation
- 2 | Identify the key skills of managers**
Use the CRAFT™ framework to outline what good management looks like
- 3 | Communicate expectations of the role to managers**
Set out what managers are expected to do and how they're expected to behave
- 4 | Onboard new managers**
Give new managers the structure and support they need from day one
- 5 | Equip managers with tools and resources**
Make sure managers have what they need to succeed day-to-day
- 6 | Gain senior leadership buy-in for manager development**
Secure visible, strategic support for your programmes
- 7 | Align manager training with organisational goals**
Show how manager development directly supports your business strategy
- 8 | Make the case for budget for manager development**
Frame manager development as a smart, necessary investment, not just a nice-to-have



1. Define the role of manager

When people step into their first manager role, they're often left to figure it out on their own. That lack of clarity can lead to confusion, frustration, and missed opportunities to lead well.

Taking the time to define what the role actually involves is one of the simplest and most powerful things you can do. It helps new managers step up confidently, and helps HR and L&D teams stay consistent when promoting, onboarding or supporting people managers.

Start with purpose

Start by writing a sentence or two about **why** this role exists in your business.

Try asking yourself:

- Why does this role matter to the business?
- What are we expecting managers to take ownership of?
- What difference should a good manager make to their team?
- What do we want people to experience when they're managed well here?

Examples:

- "At [Company], managers make sure their teams have what they need to do great work. They give direction, offer support, and help people grow."
- "Our managers lead with care and clarity. They show our values in action, develop their teams, and make sure we deliver results together."

Include core responsibilities

Alongside the purpose, outline what managers are responsible for day-to-day.

These typically include:

- Holding regular 1:1s and team meetings
- Giving feedback and supporting development
- Setting goals and reviewing performance
- Managing workloads and supporting wellbeing
- Leading through change and encouraging improvement
- Building a safe, inclusive team environment

You can tailor this list to reflect your culture and ways of working.



Top tip: Write your definition in plain, human language, not job description jargon. Share it in promotion conversations, new manager onboarding, and manager development programmes.

2. Identify the key skills of managers

Once you've defined the role of a manager, the next step is to get clear on the skills they need to do it well. That makes it easier to guide development, make promotion decisions, and support performance in a consistent way. **We use our CRAFT™ model as a simple framework to capture what good looks like:**

C - Communication

Managers talk and listen well. They keep people informed and make sure everyone's heard.

- Active listening
- Giving clear and constructive feedback
- Adapting communication style to suit different people and situations
- Sharing information clearly and concisely

R - Resilience

Managers stay calm under pressure and help their teams handle challenges.

- Managing their own emotions and energy
- Recognising signs of stress in themselves and others
- Supporting wellbeing without overstepping
- Staying calm and constructive in challenging situations

A - Authenticity

Managers are real and trustworthy. They lead with honesty and self-awareness.

- Demonstrating self-awareness and emotional intelligence
- Having honest, respectful conversations
- Showing consistency between words and actions
- Creating psychological safety through everyday interactions

F - Future Focus

Managers think ahead and help others grow.

- Identifying and developing new opportunities aligned with team or business goals
- Setting clear, meaningful goals
- Coaching others to support their development
- Delegating effectively to build skills and confidence
- Motivating others in line with team or business priorities

T - Transformation

Managers help their teams adapt and improve.

- Navigating and leading through change
- Encouraging innovation and fresh thinking
- Applying critical thinking to solve problems
- Challenging unhelpful norms constructively

You can adapt these to fit your context, but they offer a solid starting point. Once you know the skills you're looking for, you're ready to set expectations clearly.

3. Communicate expectations

(...of the role to managers)

Once you've defined the role and identified the key skills, the next step is making sure managers understand what's expected of them. This helps set the tone for how they show up in the role and gives them a reference point they can come back to over time.

Cover both responsibilities and behaviours

Expectations should outline what managers are responsible for (e.g. running 1:1s, setting goals) *and* how they're expected to behave (e.g. leading with care, building trust). Use your existing frameworks (like values or leadership models) to guide this, and keep it short and usable.

Communication expectations

- Run regular 1:1s and team meetings
- Share key updates clearly and on time
- Listen well and stay curious
- Set clear performance expectations and follow up
- Give regular, constructive feedback
Handle conflict constructively

Resilience expectations

- Monitor workloads and support team wellbeing
- Stay calm and constructive under pressure
- Help the team manage challenges and setback

Authenticity expectations

- Lead by example and follow through on commitments
- Role model self-awareness and self-management
- Create an inclusive and respectful team culture
- Build trust through everyday interactions
- Make fair, timely decisions and communicate them clearly

Future Focus expectations

- Set clear goals and review progress
- Delegate based on strengths and development needs
- Motivate individuals and teams
- Support development through coaching and feedback
- Address performance issues early and fairly

Transformation expectations

- Encourage new ideas and different approaches
- Lead small changes to improve how the team works
- Help others adapt to change positively
- Challenge unhelpful norms and drive improvement



Top tip: Put it all into a simple 'Manager Expectations' document and use it during promotions and performance conversations. This can be a useful reference point to include in your new manager onboarding process.

4. Onboard new managers

Helping first-time managers get off to a strong start doesn't need to be complicated. But they do need a bit of structure and support to succeed. Here's a simple guide you can adapt for your organisation. Use it as a checklist or talking point when shaping your onboarding approach for new people managers.

1 | Start before day one

- Let new managers know what support is available ahead of their start or promotion date.
- Share a clear role definition (e.g. your leadership model, manager responsibilities) and set expectations about what being a manager means in your culture. You can use the first three resources in this toolkit to lay the groundwork. Together, these will help you shape a clear and consistent understanding of what it means to manage in your organisation.

2 | Get the basics covered

- Provide a checklist of systems, policies, and processes they need to know. For example: performance review cycles, absence reporting, probation processes, how to raise concerns, key HR systems, and any team communication tools or meeting rhythms.
- Suggest a short check-in with their own manager to align on expectations and priorities. If helpful, include a conversation with HR or L&D to clarify any changes in responsibility and outline what support is available.

3 | Focus the first 90 days -

Give them a simple structure for the early weeks to help them build confidence, trust, and clarity, such as:

- **Start by listening and learning** – get to know the team, run initial 1:1s, learn the context, and ask questions.
- **Build trust and clarity** – be open about how you work, give early feedback, and continue 1:1s.
- **Take action** – start setting goals, delegate where appropriate, and make small improvements.

4 | Encourage early conversations -

Provide prompts or templates for team 1:1s and team meetings, such as:

- "What helps you feel supported at work?"
- "What do you think we should start, stop or continue doing as a team?"

5 | Keep development in mind

- Let them know what training, coaching or mentoring is available.
- Encourage regular check-ins with their own manager.
- Signpost relevant internal resources, such as policies, toolkits, learning materials, or leadership frameworks.

5. Equip managers with tools and resources

While onboarding gives them a strong start, managers also need practical tools they can return to as their responsibilities grow.

Here are some examples of the types of resources that help managers stay confident, consistent, and effective.

1 | Conversation guides and templates

- Performance review process
- Career development discussion guides
- Feedback templates (e.g. the IDEAS framework we use in our programmes)

2 | Day-to-day people management tools

- Probation checklists and guidance
- Absence and return-to-work process guides
- Wellbeing and workload review tools (e.g. a [Wellbeing Action Plan](#))

3 | Planning and goal-setting resources

- SMART goal templates

4 | Process and policy signposts

- Clear links to internal HR policies
- How-to guides for HR systems or reporting processes
- Key people to contact for support (e.g. HRBP, L&D lead)

5 | Development opportunities

- Training options for managers
- Learning pathways or recommended reading
- Information about coaching or mentoring (if available)

6. Gain senior leadership buy-in for manager development

Once you've put the foundations in place, it's time to turn your attention to manager development.

Strong manager development programmes build confidence, improve consistency, and help managers lead in a way that truly supports your culture and goals. But to make it happen, you'll need support and sponsorship from senior leadership. This section focuses on how to build that support and position manager development as a business priority.

Make it relevant

Link manager development to the outcomes your leadership team cares about, such as engagement, retention, team performance, or business growth. Use real examples from your organisation wherever possible.

Bring them in early

Involve senior leaders when designing your programme, for example ask for their input on what good leadership looks like in your organisation. When rolling it out, invite them to open a session, share a short message of support, or talk briefly about why the programme matters to the business.

Speak their language

Use data and strategic terms that resonate with your leadership team. Focus on the business impact, such as how strong management improves performance, reduces risk, and supports future growth.

Keep it visible

Share updates, stories and feedback from manager cohorts with the wider leadership team to keep momentum going.

Show quick wins

If you have them, share small successes and testimonials from past programmes to build confidence in your approach. Highlight improvements in engagement, team dynamics or feedback culture.

7. Align manager training with organisational goals

To get the most out of any manager development programme, it needs to be clearly aligned with your broader business and people priorities. Manager development shouldn't sit on the side-lines of your business strategy. When it's closely tied to your organisation's goals, it's easier to secure buy-in, measure impact, and show its value.

Start with the big picture

Clarify your organisation's strategic priorities over the next 1–3 years. These could include growth, innovation, customer satisfaction, culture change, or operational improvement.

Ask: what role do managers play in delivering this?

Managers are often key to translating strategy into action. For example:

- If culture change is a goal, managers shape team behaviours and norms.
- If growth is a goal, managers may be leading new hires or adapting structures.
- If retention is a challenge, managers influence engagement and progression.

Map training outcomes to business goals

Rather than offering generic skills training, define learning outcomes that support the strategic goals. E.g. "Develop managers to lead change confidently" or "Equip managers to coach for performance."

Involve business leaders in defining success

Ask senior leaders or department heads: "What do you need your managers to be doing differently?" Their answers will help you frame the programme in a business-relevant way.

Review regularly

Goals shift. Keep checking that your manager development offer is still aligned with business priorities and make tweaks where needed.

8. Make the case for budget for manager development

Manager development is essential to business success, but it can be overlooked without a clear case for investment.

To secure a budget, you'll need to show that it's a smart investment, not a nice-to-have.

Here's how to strengthen your case:

Be ready to answer "why now?"

Link your request to a current challenge or opportunity. For example: high staff turnover, new managers struggling, rapid growth, or a dip in engagement scores, or the business evolving or undergoing transformation.

Use real-world examples

Talk about the cost of doing nothing. That could include team performance issues, retention problems, or missed opportunities to develop internal talent. In times of transformation, not investing in your managers can leave teams unclear, unsupported, and unable to adapt - making it harder to deliver change successfully. Highlight how a targeted development programme could help address those issues and support long-term growth.

Back it up with data

Include credible stats or research to show how strong management impacts business performance, retention, and wellbeing. For example:

- **Gallup** reports that up to **70% of a team's engagement** is directly influenced by their manager, underscoring the link between management and motivation.
- **Mercer research** shows organisations with a "culture of health", supported by effective leadership, experience **11 percentage points lower staff turnover**.
- **Deloitte and McKinsey**, supported by CIPD, indicate that investing in manager development can lead to **up to 25% improvements in team productivity and performance**.
- **Professor Aaron Jarden's** research shows that supporting employee wellbeing through strong leadership and psychological safety correlates with **higher retention, reduced absenteeism and better mental health outcomes**.

Keep the ask clear and flexible

Present a few different ways the organisation could invest, depending on the appetite and budget available. For example: starting with a pilot programme for a small group or rolling out the training in phases. This gives decision-makers low-risk, practical options and makes it easier for them to say yes.

Frame it as business -critical

Position manager development as essential to hitting business goals, not simply an internal initiative or HR-driven extra.