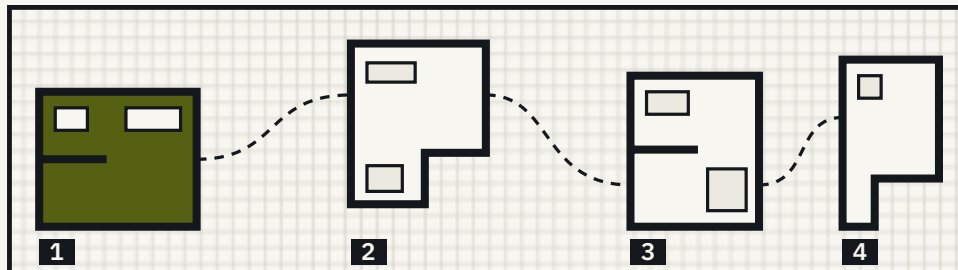


New District Manager Worksheet

New district and area managers taking over a role.



FOUR UNITS ON ONE BOARD, ONE ROUTE BETWEEN THEM

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|-----------|---|------|
| 01 | LIST WHAT YOU INHERIT, AND SORT EACH ITEM | p. 2 |
| 02 | NAME WHAT CHANGES, WHAT STAYS AND WHAT LEAVES | p. 3 |
| 03 | LIST WHAT YOU MUST LEARN, AND WHO CAN TEACH YOU | p. 3 |
| 04 | LIST WHAT YOU LET GO OF, AND WHO PICKS IT UP | p. 4 |
| 05 | GET BACK TO THE PEOPLE WAITING ON YOU | p. 4 |
| 06 | RECORD WHO ELSE WAS TOLD, AND WHOSE VIEW OF YOU WILL CHANGE | p. 5 |

- Q1** What did [the last leader's name] agree to that has no date on it?
- Q2** What did [manager's name] hear that you have not yet heard?

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■ Name what changes, what stays and what leaves

Taking over changes the work from doing to influencing. Write down which parts of the role are now yours, which stay with the people under you, and which leave the role altogether.

- ☐ What changes in your role now that you answer for [the units you lead]?
- ☐ What stays with [manager's name]?
- ☐ What leaves your desk entirely?
- ☐ Who needs to be told that it has left?
- ☐ Where do you notice yourself reaching for the old job's tasks?
- ☐ How do problems in [unit] find their way to you?
- ☐ Changes: [the part of the role that is new]. Stays: [the part that remains with the managers]. Leaves: [the part that goes].
- ☐ Write the one task from your old job you are most likely to go back to: [the task].

■ List what you must learn, and who can teach you

You will not learn all of it from a handover note. Name the things you do not yet know, and next to each, a person who does.

- ☐ What do you not yet know about [unit] that [manager's name] could tell you?
- ☐ Who knows how [the process that slipped] really runs?
- ☐ What does [your boss's name] carry in mind that is not written anywhere?
- ☐ When [manager's name] describes the last leader, what does that tell you about what they now expect?
- ☐ Learn: [the topic]. Teacher: [name and role]. Ask by: [the date].
- ☐ Learn: [the second topic]. Teacher: [name and role]. Ask by: [the date].
- ☐ Who can show you the numbers behind [last quarter's result]?

Free sample from FieldNoteReference

These are 2 of the 5 pages of the New District Manager Worksheet.

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