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## **Feature Article: Making the Transition from Technical Writer to Manager**

by *Steve Wicinski*

So you've given it a lot of painstaking thought. It's decided. It's time. Time to move into management. After all, you've worked hard to get where you are. You've paid your dues working through the various levels of technical-writing jobs, and survived all the promotional requirements to get through each position, and so on. As a senior-level professional, you're at a crossroads. How do you prepare and are you absolutely sure you want to make this transition?

Clearly, not everyone is cut out for management. For some, the thought of being responsible for more than one's own work is unheard of....sometimes even frightening. For others, management is a logical stepping stone into an entirely new career.

This article is a collage of ideas and experiences from some people who've made the leap from writer to manager. Although it's not a step-by-step guideline, it provides some compelling insight as to what individuals might expect as they transition into the management ranks. Even if you are an experienced manager, you might find these ideas helpful.

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### **Preparing for the Transition**

Before you accept a management job, it's a good idea to carefully evaluate your current job responsibilities and compare them to what might lie ahead in a management capacity. Depending on where you work, the newfound differences can be startling, even exasperating. Consider the following comparison of a typical writer's responsibilities compared to that of a typical manager.

- **Writers** — Typically, they: plan individual writing projects; gather information for projects; interview subject matter experts; write, edit, and configure documentation on multiple mediums; serve on other project teams; test hardware and software; attend appropriate meetings.
- **Managers** — Typically, they: plan projects for others and delegate them; contribute to strategic planning; prepare and manage budgets; facilitate information gathering across organizations; manage people individually and as a team; write and deliver performance reviews; evaluate and select tools and technologies; interview and select job candidates; train new employees; address employee conflicts; rate performance; hire and fire; attend

and conduct meetings.

At first glance, one might argue that managers simply do more work than writers. In reality, both likely perform equal workloads. It's just that managers are usually responsible for a lot more things — most of which individual contributors rarely get involved. Clearly, in an ideal setting, it takes both writers and managers to successfully produce the expected ongoing results.

With all that said, how does one prepare for a management position? Some suggestions include:

- Clearly understand the job's expectations. Talk to your human resources representative and the hiring manager to outline the objectives. Make sure there are no hidden agendas or tasks that aren't clearly labeled for the overall position.
- Even if you have a management degree, consider taking a management class, seminar, or refresher workshop.
- Subscribe to trade journals and newsletter publications that address management issues.
- Talk to other managers to get a perspective on what works and doesn't work for them. You can learn a lot from other peoples' mistakes and successes.

Above all, keep an open mind and don't let anyone discourage or sway you away from becoming a manager if that's what you really want. Like all jobs, it's going to take preparation and a lot of perseverance. Once you've made the plunge, you can set the pace and channel your efforts to effect the management experience you're hoping for.

## Inheriting a Staff

In many cases, new managers step into a ready-made position, complete with staff, slews of corporate policies, practices and procedures. Clearly, you will want to tailor the position to your own personal style. To accomplish this, there are a number of things you can do, including:

- Get to know each staff member individually. Set up private meetings to go over roles, responsibilities, happiness with the job, and so on. If you already work with the people you're now managing, due to your new role in the organization, you should still speak with them individually to get a different perspective on their views and opinions. People will open up.
- Unless you already know how the former manager did specific things, it's in your best interest to find out, especially if you're completely unfamiliar with the company or organization. There's something to be said about continuity or keeping the "status quo," at least while you're starting a new job within an established team. The key is to continually address new ways of improving operations as you mold the job to your own management style, discussed later in the article.

There's an old saying that if something's not broken, don't fix it. Then again, some experienced managers firmly believe that to get to the next level of success, you need to break the unbroken to move forward. This is particularly true when you're trying to improve an old, yet seemingly efficient process that could be made better.

- Meet regularly with your staff as a team to find ways to improve operations.
- Introduce your staff to your management style and discuss expectations.
- Continuously ask for suggestions, keeping all staff members involved.

And lastly, don't forget to have fun. Per budget constraints, plan outings and functions outside

of the work setting to reward and recognize people individually and as a team. A little, ongoing recognition goes a long way, especially in today's corporate climate.

## Establishing a New Staff

If you are fortunate enough to land a management position with the freedom to create a new staff from scratch, there's a number of things you must carefully consider.

- *Scope of your organization* — Are you going to be responsible for just documentation, or are you expected to address training, testing, QA, and other functions?
- *Workload* — How many people are you going to need in order to accomplish all the duties outlined in your scope? Detailed project plans are the key here. Not only will they unveil how much work is to be done, you will have established a guideline by which to monitor a worker-to-workload comfort zone. This can help you down the road— especially whenever you need to request additional resources.
- *Budgets* — Are you ready to become a number cruncher? First, find out if this is really your responsibility. Most organizations use financial professionals to track the numbers related to overall expenses.
- *Permanent staff vs. contractors* — Considering the scope, workload, and budgets, how realistic will it be to maintain a long-term staff?
- *Working relationships with other teams* — What are all the other teams and organizations with which your team will interface? Have they worked with a documentation team before and how willing are they to include your team in all phases of the organization's project life cycles?

Once you've addressed these and other tough issues that may arise, you can go to work selecting your team members.

## Developing your own management style

What exactly is a management style? When I first became a manager, all the upper-level managers I reported to boasted endlessly about how they developed their management style and insisted I do the same. Instead of providing valuable guidance, some of them would make observations about my demeanor and cheery camaraderie with my writers. I can recall comments such as, "You can't expect everyone to like you," and "You're far too worried about making everyone happy." The fact is, I was developing a management style, be it good or bad, without even knowing it. And far be it for my "superiors" to even realize that my style was actually working positively for me at that point in time.

You can find all sorts of books, web-based articles, and so on about this subject. You can go to schools, get management degrees, attend seminars, and even work with countless management consultants. But what many managers have found is that their management style often boils down to a few main ingredients, namely: open communications, organization, and a personality that ties it all together. Consider this. If you tend to be a tyrant and a dictator, chances are, no "Management Etiquette" or procedural one-size-fits-all guideline is going to improve your effectiveness. On another note, if you're a passive, easily influenced person who approaches your day-to-day activities without any organization or purpose, chances are you're going to fail and your management style, whatever it is, won't help you, either. Sound confusing? It really doesn't have to be. The point is that despite your personality, demeanor, or even your temperament, if you can effect open communications in every avenue of your work (with your employees, with your peers, etc.), conduct your work in an organized manner, and glue it all together in a civilized manner, your overall style will emerge.

Developing a management style isn't rocket science or anything new for that matter. And, it's not something you do once and never modify or improve upon. Like everything else, a good manager always looks for ways to improve things, including his/her own management methodologies.

One seasoned manager who interviewed for this article says that a big part of her management approach consists of putting each of her employees in a box (categorically speaking, of course). There's the *novice* box, the *rebellious* box, the *whiner* box, the *bully* box, and so on. Because no one reacts to policies or procedures in the exact same way, this manager deals with each box differently to effect the results she needs. "You simply cannot treat everyone the same way. You have to figure out who you're dealing with, and treat them accordingly," she says. Also, she goes on to say, "Always deal with rebellion head on; otherwise, it festers and can infiltrate your other employees, resulting in a treacherous, deteriorating work environment."

Again, considering the key elements (communications, organization, and personality), as you develop your own style, keep the following in mind:

- Promote open communications within and across your organization.
- Implement non-threatening ways to periodically track performance without micro-managing people. Remember: they have their jobs and you have yours.
- Be willing to accept something less (or even better) from your employees than you could do yourself. (More on this topic later.)
- Don't be a pushover, but also don't be a tyrant or a bully. People WILL end up hating you, which can adversely affect your career down the road. People might still end up hating you no matter what you do, but at least you will have created an ethical management style that you can live with.

## Realizing Your Accomplishments in a Different Way

Typically, most of us working as individual contributors without the added stress of management responsibilities come home from work each day feeling we've accomplished something. Perhaps we designed a new help system, fixed a software bug, wrote a technical article for a newsletter, or edited a stack of marketing materials a day early. Whatever the accomplishment, we feel good about it. Really good. That sense of having started and completed something makes what we do all the more rewarding. When people transition into management, they sometimes find that those feelings of accomplishment occur less frequently. Instead of starting something and completing it the same day or week, tasks become long term, taking weeks or even months to complete. For some, this can quickly become frustrating, even depressing. For those of us who thrive on that daily adrenaline rush we get from accomplishing something, this frustration can often tempt us to slip back into our pre-manager, individual-contributor activities, putting the management factor by the wayside. For a new manager with this tendency, this has to be resolved to successfully move forward in a management capacity.

If we step back and look closely at what management is really all about, we quickly realize it's about driving projects and accomplishments at a higher level. It's about bringing talent together to coordinate and streamline the numerous activities of other people. It's about taking that talent and determining who is best suited to do certain things, and delegating assignments accordingly.

As new managers, we eventually begin to realize our own accomplishments and successes through other people. As one manager put it to me so matter-of-factly, "The reality is that other people finish stuff. As a manager, you notice your successes in a much different, broader way. If you can't get used to that, management is not for you."

## Learning to Delegate

For those of us who are used to doing everything ourselves, we find it most difficult to turn others loose on a variety of tasks, thus making our transition into management a long and winding road. But once we finally accept the fact that we can't do everything single handedly, we learn to delegate.

Some basic suggestions on achieving this include:

- Start every new management job with project plans.
- Interview each employee individually.
- Ask your employees what they like most about their jobs and the organization.
- Ask them what they feel the organization does best and worst.
- Ask them what they would change.
- Ask each person what he/she does best.

Most times, people working under new management will open up and freely offer their opinions and suggestions. You will find that some will even talk positively and negatively about other people in the organization. During these sessions, be sure to carefully keep things in perspective and above all, confidential. The ultimate goal is to get an understanding of each person's professional strengths, weaknesses, career goals, and so on in order to utilize their talents in the best possible manner.

## Getting Other Managers to Treat You As a Peer

Whether you're new to the company or organization or have been employed there for a while, there might be times when other team managers (e.g., your peers in software development, support, engineering, and son on) choose to exclude your team from crucial project-planning activities. Whether this is intentional or an oversight, when this happens, we know all too well the consequences. Documentation gets involved late in the project cycle, causing delays in the writing process, publication deployment, and overall slipped release dates.

One major key to avoiding all non-communicative scenarios is to make sure your staff is engaged in all crucial planning activities from the getgo. This requires open communications among all parties involved. If you are establishing a new documentation department from scratch, getting the buy-in, recognition, and acceptance from other "established" peer organizations can sometimes be particularly difficult. To deal with that situation, consider the following:

- Prepare, maintain, and deliver a presentation about your team and the integral role it plays in the overall project schemes. Be prepared to give this presentation more than once and to a variety of tough audiences.
- Be prepared to illustrate the documentation life cycle and how it closely inter-relates to other initiatives, such as development, engineering, and support.
- Use quotes from prestigious publications such as trade journals, white papers, and newsletters that support the importance of quality documentation and the value-add it brings to the table.

The more prepared and convincing you are, the more widely accepted you'll be — even by your

toughest critics.

## Accepting Something Less Than You Can Do Yourself

Many years ago, one of my former, less-than-favorite managers actually taught me one very important lesson. Repeatedly, he'd preach, "Steve, one key to becoming a successful manager is to be willing to accept something less than you could do yourself." That advice has stuck with me and helped me through a number of challenges while managing a variety of people over the years.

It goes without saying that managers, by and large, want and expect the very best from their people. The best performance, great attitudes, the highest work ethics, and the best possible end results. While most experienced people have no problem producing magnificent work for their respective companies, newcomers often have to overcome a variety of hurdles before they can become as productive or even as skilled as more experienced workers. Therefore, it is incumbent upon managers to be aware of the various levels of expertise on their teams and find ways to apply those various degrees of expertise accordingly.

As managers, those of us who put high expectations on ourselves are likely to set the same or similar standards on all the employees who support us, including the newcomers. There are times, however, when we as leaders need to step back and give people time to grow and perfect their craft. And everyone I interviewed for this article agreed: micro-managing is not the answer. People need both space and guidance at the same time. True, if we assign a project to a senior-level professional, it's logical to expect something of higher quality than from an entry-level person. The key is being able to recognize when less quality is still good and acceptable to meet the project requirements.

So when is it appropriate to accept work that might be of lower quality compared to what you (the manager) or another senior professional might produce? And how do you set the guidelines for this determination? Consider these suggestions:

- Set clear standards that all employees — experienced and novices alike — must follow. This might include (but not be limited to) established, pre-existing company- or department-level processes, such as:
  - **Writing Guidelines** — Typically, these address areas such as content requirements, sentence structure, grammar, company acronyms, punctuation, person, tense, and so on.
  - **Training Development Guidelines** — These standards might include a methodology that everyone must follow to generate computer- or web-based instruction.
- Make sure that everyone on your team understands the guidelines, receives the proper training to use them, and abides by them.
- Keep an open mind to creativity. People in creative jobs will always find different ways to add their personal spin and flair to the work that they do. Not everyone works the same or approaches things in the exact same way.

After you have established clear standards and ground rules for everyone on your team — from entry-level novices to seasoned, experienced workers — proceed with making assignments. In

doing so, keep in mind the complexity of each project and each employee's experience level.

When a less-experienced person works on a project, depending on your resource availability, it's always a good idea to assign a senior-level person as a mentor. That way, it can help the learning process and give the newcomer a sense that they're on the right track. When it comes time to review a less-experienced person's work, that's when the standards and guidelines come into play. If they meet the requirements yet don't quite measure up to what an experienced person might produce, but STILL accomplish what is needed for the project, that's where the philosophy of accept something less kicks in.

Sometimes there's a fine line in disseminating when it's acceptable and unacceptable to accept lower quality work, especially from novices. As a manager, it takes practice but it's a worthwhile exercise. One thing to consider is to always encourage people to perfect their craft but be sure to praise them for their milestones along the way.

## **Dealing with Co-workers Who Formerly Worked With You**

Becoming a manager over people who were once your peers can present a whole new set of problems. In many cases, managers find that existing friendships are harder to maintain, become compromised when friends begin taking advantage of the situation, or become closely scrutinized when other employees make accusations about the manager. All too familiar issues like partiality, favoritism, and the like can begin to surface and fester.

Some people who interviewed for this article claim that in order to maintain long-lasting friendships with people they now manage, they had to make clear, obvious distinctions between their work relationships and their social relationships with employee-friends. Doing so took some drastic action. In particular, one manager stopped all one-on-one social interaction with each of her employee friends. That meant not going out to lunch together, no mid-day breaks alone together, and so on. Although tough, these shifts in social interaction helped to maintain the manager's credibility. Things got so bad for one manager, he ended up severing all social ties with his employee friends. Although a drastic decision, it was a necessary evil considering the personalities and the pressures that were involved.

One thing all managers agreed on was the longer you wait to keep friendships and work relationships separate, the worse things can get in the long run. Nip it in the beginning and start on the right foot. Maintain close friendships outside of work.....not inside. At a minimum, don't make personal friendships with employees so obvious.

## **Giving the Monkeys back**

Clearly, one characteristic of a good manager is knowing how to fully utilize the skills and competencies of the people on his or her team. Doing so requires meeting regularly to discuss project plans and to delegate tasks. Quite often, during these face-to-face meetings, new managers find themselves walking away with more action items (monkeys) than the employee. This should not be the case, so how does this happen?

Sometimes, savvy employees find tricky ways to unload existing tasks and/or avoid acquiring new ones. If they can't dump tasks on their co-workers, they'll often try to somehow unload them on their managers — especially new, unsuspecting, gullible managers.

Several years ago, I inherited a staff of writers and software programmers who were developing publishing applications for a corporate-wide conversion effort. Although one of the programmers

handled the contract arrangements for our leading software vendors, when I took the job as his manager, he immediately insisted I take over that responsibility. He would constantly tell me how I needed to call this vendor and that vendor, how I needed to evaluate and process this contract and that contract, and so on. In essence, he found an opportunity to take monkeys off his back and put them on mine. Not knowing any better, I obliged and immediately became burdened with a slew of complicated tasks that I knew little about. After all, he knew all the contacts, was familiar with the process, and was able to handle the communications stream and decisions with the contracts single handedly. What was I to do now?

After a lot of deliberation and anger, I confided in my boss. Outraged by my employee's conduct, my boss offered to correct the situation for me. But I knew that in order to establish my own credibility and authority as a manager, I would have to solve this one myself. So I collected my thoughts and arranged a private meeting with the employee to "give the monkey's back to him." At first, he was resentful, but after I so eloquently presented my position on teamwork, he got the message.

Although this worked out in this instance, obviously it's not always unreasonable for a manager to take action items after reviewing a situation with an employee. But knowing how to identify the monkeys and how to give them back is absolutely a necessary skill.

## **Learning How to Evaluate Performance**

One of the touchiest issues a manager will ever address is personnel performance. Not only are company requirements usually working against you (e.g., that dreaded, age-old adage that every manager must identify at least one bad performer per year), there's also the fear of being too subjective instead of objective in your rating process. What's a manager to do?

For starters, performance appraisals should never be a surprise. If appraisals are done correctly, each employee knows where he or she stands at any given point in time. To ensure that's the case, evaluations need to occur not once a year, but many times per year. For example, some companies give appraisals every quarter, while others conduct them on a semi-annual basis. As a manager, it is incumbent upon you to devise an appraisal methodology that is conducive to your targeted goals and schedules.

Insofar as what areas to rate your people on, most companies have pre-established guidelines. However, if you can be specific and tailor expectations and results to custom fit your team, by all means that is the way to go. As you do, you must carefully consider the level of experience you're rating. For example, it's quite common to rate an entry-level employee higher for doing a level of work that's normally expected from a senior-level person. On the flip side, it's possible to rate an experienced person lower for doing excellent quality work for something that is normally expected from a lower-level employee. Quite often, there's a fine line in determining what's fair. The key is having some clear guidelines to keep things in perspective.

## **In Closing**

In addition to all the things we've discussed throughout this article, be constantly aware of politics. As a new manager, it's easy to put blinders on and think that politics cannot affect you or your organization. They can. The trick is to keep up with politics. Remember: the people who support you are also relying on you to keep them informed, not only on a project-to-project level, but also at a corporate and organizational level. Make sure you know what's going on within and outside of your organization. Make sure you're properly engaged and aligned with your upper management, including your boss, his/her boss, and his/her boss. Make sure you're invited and available to attend all the right things, from meetings to social functions, and so on.



Over time, this will ensure a successful groundwork for developing close working relationships with all your peers.

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