

# Learning to Lead

For managers and leaders

Career  
Transition  
Series



**Australian Government**  
**National Mental Health Commission**

Paper 3

# About the career transition series

## About these guides

These guides are a nine-part series developed to share research-led practices on career transitions to help support mentally healthy workplaces. In this series, you will find best practice strategies along with the stories of organisations supporting their people through eight key transitions. We share first-hand accounts of the career transitions many of us will experience in our lifetimes, whether it is having a baby or a career change, a personal crisis, or retiring from the workforce altogether.

## Why these guides exist

Developed by the National Mental Health Commission in partnership with Transitioning Well, these guides emerged as part of the National Workplace Initiative (NWI) after early research and consultation highlighted the toll of a number of career transition points on the mental health of employees. These guides are based on the findings of this [Green Paper](#). They blend published research, insights from experts, and first-hand stories of individuals who have experienced or supported their people through transitions. We thank everyone who contributed to these guides and the organisations who permitted us to share their unique stories.

## What these guides aim to do

- Recognise the impact of career transitions on workplaces and workers
- Inform workplace leaders and individuals about the importance of supporting transitions throughout the career journey
- Showcase how organisations can support workers across the life cycle in helping to promote and sustain mental health at work
- Share inspiring examples of forward-thinking organisations implementing research-led practices to proactively support career transitions.



# Organisational-led approaches to support mentally healthy workplaces



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## About this transition

The transition from peer to boss is not an easy one. New leaders or managers can experience a range of individual challenges at this time, from imposter syndrome to identity changes and decision fatigue to difficulty managing their work relationships. These challenges can have costly implications for organisations if leaders and managers are not supported to do their best work.

Leadership career transitions may come about from a step up or unexpectedly from organisational changes. Many new leaders rise to leadership or managerial roles based on technical ability but may lack key management and people skills to succeed in their new role.

## Key Messages

1. Leaders are found at every level, but the transition into roles that require managing others are particularly challenging and leaders are typically underprepared for, and under-supported during, this transition.
2. New leaders and managers may experience a range of challenges navigating this transition, including imposter syndrome, identity changes, managing work relationships, feeling like a novice again, and decision fatigue.
3. Organisations can provide tailored support and remove stigmas that can promote and protect leaders' mental health and wellbeing during this transition.

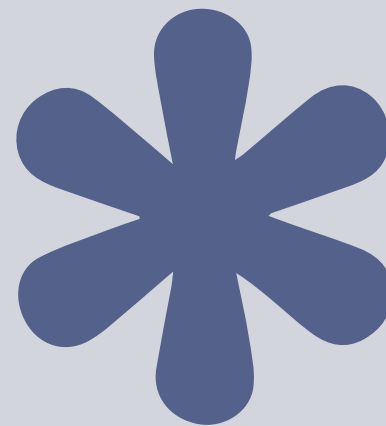


# Key considerations

**91%**

of first-time managers' report feeling isolated, with 88% reflecting that minimal face time with their teams exacerbates their burnout.

Harvard Business Review, 2022<sup>2</sup>



**54%**

of young leaders experience burnout.

Adecco Group, 2021-2022<sup>3</sup>

**27%-46%**

of executive transitions are regarded as failures or disappointments two years on from the transition.

McKinsey & Company, 2018<sup>4</sup>

# Why it is important for an organisation to support this transition

Transitioning into a manager or leadership role is significant and can involve adjustment of one's identity, with new challenges, changes and demands. Despite the high stakes of management roles, leaders are typically underprepared for, and under-supported during, transition to new leadership roles, with estimates that nearly half of leadership transitions fail.

There are established relationships between the wellbeing of leaders and leadership behaviours, team member performance and wellbeing, and overall leadership effectiveness. Yet limited attention has been paid to how transitioning into leadership impacts the individual's own wellbeing.

## Risks and their impacts on the team/organisation

- Being a leader is detrimental to an individual's wellbeing, mainly due to the additional managerial work stress and supervisory responsibilities.
- The scope of leaders' roles is often reflected in long working hours, heavy workloads, and continual change and uncertainty. Managerial anxiety about being held accountable can lead to micromanagement and struggle with the tension between supporting staff and managing their performance.
- As leaders are expected to display strength and resilience, there is a small but growing body of evidence relating to the negative stigma experienced by leaders with mental health issues.

# 4 ways new managers and leaders can internalise the transition

According to Nancy K Schlossberg, a leading expert in the areas of adult transitions and career development, a transition is defined as any event or non-event that results in changed roles, relationships, routines and assumptions.<sup>5</sup>

For new leaders or managers, this transition may look like this:

## Roles

'Now I am leading the meetings not just in them.'



## Relationships

'My relationship with my peers has now changed from Mate to Manager'



## Routines

'Finding the new rhythms of my day need to be considered across the team not just me.'



## Assumptions

'People will find out that I don't know what I'm doing and will see through my inability to manage the team.'



# Why stepping up can feel like hard work

As with any significant career milestone, such as becoming a working parent or retirement, moving from our old roles into new ones can feel messy. We are aware the goalposts have moved but we are yet to figure out how to integrate these new demands into our existing lives.

According to Nancy K Schlossberg, a leading expert in transitions, a transition can only exist if the person experiencing it considers it to be a transition; and this is where organisations can really make a difference. By creating awareness of the challenges to know they are not alone, organisations can provide tailored support and remove stigmas that can impact leaders' mental health and wellbeing during this transition.



# Common challenges

## Imposter syndrome

Imposter syndrome is prevalent in every industry and every profession. Not even high-achieving individuals and athletes are immune to imposter syndrome. Well-known figures such as Sheryl Sandberg and Albert Einstein have admitted to doubting themselves or feeling less than deserving of their successes.

It is estimated that 80% of people will experience feeling like a fraud at some point in their lives. And the more successful you are, the more you feel like an imposter.<sup>6</sup>

In the workplace, imposter syndrome typically results in lack of confidence, poor decision making, underperformance and if left unchecked it can affect an individual's mental health and wellbeing.

## Changing identity

The transition to a new leadership role requires an identity shift. New leaders are likely to experience anxiety, conflict and threat connected to valued aspects of their identities. These identity challenges are also more significant in the experiences of new leaders from minority and non-dominant groups.<sup>7</sup>

To become comfortable with this identity change, new leaders must experiment to determine their unique leadership style before they can fully realise their potential.

It may take some time to form habits like focusing on strategic work and diversifying professional networks, but once these things become second nature, a leader's identity will become clear.

*The only way to think like a leader is to first act... In times of transition and uncertainty, thinking and introspection should follow action and experimentation—not vice versa.*

- Herminia Ibarra, Professor of Leadership and Learning. INSEAD<sup>8</sup>

## Managing friends

Moving from friend to manager can be complex for both parties. Egos and emotions can often get in the way. Some peers may feel as though they deserved the promotion and be less than supportive. Other closer colleagues may assume they will now receive special treatment or be less inclined to follow processes.

Emotionally, managers and leaders can experience loneliness during the transition from 'mate' to manager. They may not feel like they can share the challenges and frustrations they once had when their peers shared the same responsibilities. Without this peer support, some new managers may experience mental health issues or avoid seeking help out of fear they will be perceived as not being up to the job.

## Feeling like a novice again

The transition to manager and leader is one that can happen overnight, so it is common for leaders to feel out of depth in their new role. If new leaders were in their previous position for a while, they may feel as if they mastered their responsibilities and deliverables. It can be disconcerting to feel like a novice again, particularly when the team is looking to the leader for all the answers.

With a leadership change often comes a salary bump and higher stakes. The risk of failure is now financial, and this can add pressure. Organisations can help by promoting a culture of ongoing learning where it is acceptable for new leaders and managers to be continually learning and take a 'fail fast' approach.

## Decision fatigue

It is not uncommon for leaders and managers to experience decision fatigue. It is said to be the reason why Barack Obama only ever wore blue or grey suits, and why you always found Steve Jobs in his trademark black turtleneck and denim uniform. It is estimated that the average person makes 35,000 decisions every day, so we can safely assume for a leader that may be even more.

The adage "with great power comes great responsibility" rings true for leaders and managers in this transition. It can feel overwhelming to make tough decisions and have hard conversations day after day. Leaders and managers will need to learn strategies to preserve their mental energy to avoid decision fatigue and burnout.



# Tips for transitioning from team member to team leader



## For Organisations

### **Start training before formal leadership roles commence**

To help a new manager feel prepared to step into their responsibilities, conduct formal and informal training in management and leadership skills including external mentoring and coaching. This can include understanding their own management style; how to build trust; managing increased responsibilities and demands, and managerial work health and safety responsibilities.

### **Develop policies and processes for 'in boarding'**

There are many benefits to promoting within, but often internal companies skip important processes that a new hire has the opportunity to do when starting fresh. Some of these challenges include doing two roles at once; meaning the transition is delayed while handing over their previous workload. Internal hires often hit the ground running without time for learning or to assess their leadership style. The new leader or manager also has to contend with 'baggage' or preconceived notions from existing employees.

### **Establish peer-networks**

Leadership communities such as peer networking and 'promotion' cohorts (for medium to large organisations) allow new leaders to discuss challenges and develop skills in a supportive environment.

### **Create forums for managers and leaders to present their mistakes and failures**

Organisations can promote a mentally healthy culture of ongoing learning where it is acceptable for new leaders and managers to be continually learning and 'fail fast' without fear.



## For Individuals

### **Conduct 1:1 meetings**

One-on-one meetings give you the opportunity to get to know team members, understand their roles, motivations, and personally communicate your new appointment.

Ask them to define their roles and listen carefully. Knowing where they add value means you will know how to enlist their help. This also gives the team member agency and autonomy over their work.

### **Set boundaries**

Many new leaders or managers think they need to become a different person to lead well. Be yourself, but set firm boundaries. You can do this by being transparent, clearly defining roles and communicating your expectations. With team members who are friends you may need to be clear about your work-personal boundaries.

### **Ask for feedback**

No-one expects you to have all the answers straight away. Ask for feedback to check the team is on board and to get their buy in. Be transparent and accountable, and others will follow your lead.

### **Check-in**

This transition is going to take some time to get into the new rhythms and routines. Create a system of regularly checking-in to adjust your management approach with different reports and build close relationships. Do not forget about also doing this with your manager to get support with challenges they may have overcome themselves.

### **Self-care. It is not just a buzzword.**

Prioritising sleep, setting boundaries, eating well and exercising are all cornerstones of good health—as is knowing when to switch off from work to ensure appropriate downtime to rest and recover from the demands of the day. As new leaders and managers may be overworking to prove themselves in their new role, organisations can assist by communicating policies such as discouraging emailing outside of work hours and on weekends to protect and promote a mentally healthy culture.

# How to navigate moving from 'mate to manager'



## Scenario

## Manager Script

**A team member who is a close friend of the leader expects to be given special treatment because of their relationship.**

"As your manager, it would be unprofessional of me to show favouritism for this project/issue. Let's think together if there's another way we can solve this problem?"

**A team member comes to the new leader with frustrations and problems like they previously shared when they were peers.**

"I can understand why this is difficult. However, we need to deliver this on time to the best of our ability, what resources do you need or how can I help?"

**A team member is unlikely to meet a target or deadline and only communicates this at the eleventh hour.**

"As always, if there are any issues with meeting the target today, please call me and we can chat through the best plan together."



## Feeling overwhelmed and not sure where to start?

We recommend normalising the challenges of this transition and creating a psychologically safe environment, so that your new leaders and managers know they can 'fail fast' and not beat themselves up when those inevitable missteps happen as they learn to lead.

# Learning to lead

## Case study

### At a glance



- RSM was looking to develop a program that would ensure high performers being promoted into leadership positions were not only technically competent but great people leaders too.
- One of the key challenges of running the program nationally during the pandemic lockdowns was converting the primarily face-to-face program to virtual and still reaping the same benefits.

**Having grown into one of Australia's leading professional services firms over the past 100 years, RSM Australia is committed to enabling clients to understand better what matters most to their business.**

### Fast facts

- 1600+ Staff
- 33 Offices



### Activities and outcomes

- In professional services, promotions are generally based on strong business and technical competence. RSM recognised they needed to ensure newly promoted employees were also great people leaders who would one day lead the firm. Given research shows that managers can make or break employee engagement, RSM developed a leadership program to address this gap.
- The launch of RSM's Leadership and Management Program (LAMP) for high performers was developed to help them transition into senior leadership roles.
- Designed to enable and empower self-directed learning, LAMP is an invitation-only program, with nominations approved by the Board, to create a strong pipeline of future leaders.
- The LAMP program is based on a blended learning approach using 70:20:10 learning principles. Participants learn 70% of their knowledge from challenging experiences and assignments, 20% from developmental relationships, and 10% from coursework and training.
- Over 12 months, the program covers pre- and post-program activities, DiSC 363 Profiling, Program Induction, 5 Formal Modules, Coaching, Peer-to-Peer Connections, Reflective Practice and Project Work.

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Investing in your future leaders and setting them up for success is one of the best things an organisation can do. Its benefits are far-reaching, not only for the manager but for their teams and the business.

Elizabeth Nunez, RSM National P&C Director

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## Key results

Since the program's induction, RSM has created a pipeline of well-rounded professionals who can lead the firm into the future.

- Over 125 managers (9 cohorts) trained since 2014.
- 80% of participants promoted (26 partners and 30 principals).
- Consistently rating 90% overall satisfaction score.

### Key Takeaway

Work with a subject matter 'leadership' expert to facilitate the program and give it credibility.



## Advice for others

- **Best practice principles.** Allow participants the opportunity to apply their learnings over the duration of the 12-month program, which aligns with best practice learning principles.
- **Real workplace challenges.** We found participants using their own real workplace challenges as the basis for learning makes the program both practical and relevant.
- **Learning from others.** Building on group discussions around workplace challenges, participants learned from others in their cohort who faced similar challenges, which built stronger connections.
- **Program logistics are enormous,** so organisations need to ensure adequate time, resources and effort are invested into making the program a success.
- One of our key challenges over the past 12 months has been **converting what is primarily a face-to-face program to a virtual one** during lockdowns and still reaping the benefits. This was incredibly challenging given this is a national program with participants from different disciplines and states and territories.



# Worth a read

**Bud To Boss. How to Thrive and Survive as a New Supervisor.**

2022

*Read here:* <https://www.budtoboss.com>

**What to Do First When Managing Former Peers,**

Harvard Business Review, 2015

*Read here:* <https://hbr.org/2015/09/what-to-do-first-when-managing-former-peers>

**Peer to Boss: The Important Transition No One Told You About,**

Forbes, 2022

*Read here:* <https://www.forbes.com/sites/miriamgrobman/2022/01/31/peer-to-boss-the-important-transition-no-one-told-you-about/?sh=5310915535fb>

**Internal promotions face unique challenges,**

HR Daily, 2022

*Read here:* <https://www.hrdaily.com.au/news/internal-promotions-face-unique-challenges-10648>

**An investigation of factors that promote and inhibit performance during leadership transitions,**

Ty Wiggins, 2019

*Read here:* <https://ro.uow.edu.au/theses1/541/>



# Read more in this series:

**Paper 1**

Career Transitions Series: General Principles

**Paper 2**

Career Transition Series: Entering the Workforce and Young Worker Transitions

**Paper 3**

Career Transition Series: Learning to Lead (*this guide*)

**Paper 4**

Career Transition Series: Parenting and Caring

**Paper 5**

Career Transition Series: Redundancy and Career Change

**Paper 6**

Career Transitions Series: Health-Related Changes

**Paper 7**

Career Transition Series: Relocation

**Paper 8**

Career Transitions Series: Crisis and Career Shocks

**Paper 9**

Career Transitions Series: Late Career and Retirement

[Click here to read the other papers in this series](#)



# References

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- 8 Ibarra H. Act like a leader, think like a leader. Boston, Massachusetts: Harvard Business Review Press; 2015.

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