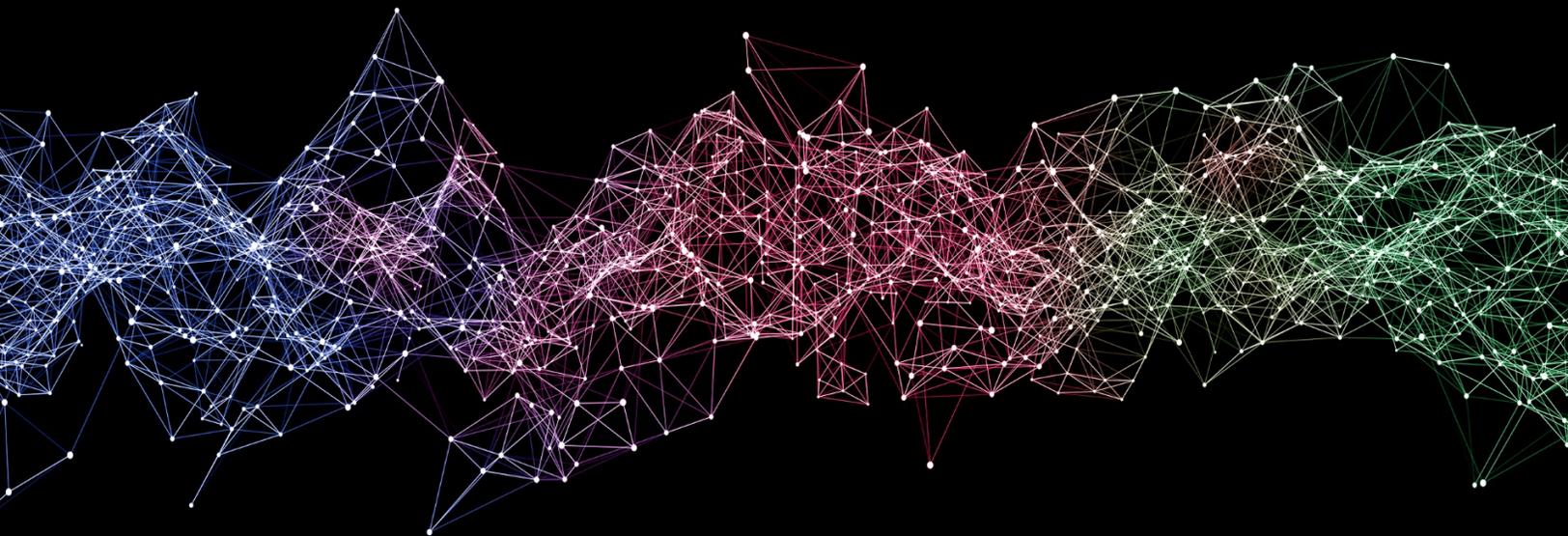


1<sup>st</sup> Edition

THE

# TECHNICAL LEADER'S



# BLACKBOOK

A Nerd's Practical Handbook for Leading People, Projects, and Teams  
...without Looking Like an Idiot.

**JAMES A. HADLEY, PHD**

**JESSICA JOHNSON**

*This book is dedicated to the millions of brilliant women and men whose authority to lead is nothing more than their brains and their hands.*



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# Why we wrote this...thing

## Who this book is for

Every day, all over the world, technical experts are thrust into leadership roles. They might become team leads, technical leads, product managers, or supervisors.

What they all have in common is that they are experts (or close to it) in their domain. But suddenly the job requires being much more than an expert. It's being a leader, a project manager, a trainer, a communicator, a troubleshooter, and much, much more.

Are you one of these people?

Taking on these additional responsibilities can feel overwhelming. And, let's face it, you don't get a lot of training on how to do it or how to do it well. This guide is for all technical leaders who were plopped into a leadership role and are begging for help.

We, Jessica Johnson and Jim Hadley, have trained technical leaders at all levels and numerous disciplines. We've interviewed crazy-smart people who struggle with their new leadership responsibilities and just want to do a good job. We've taught classes for technical fellows, IT managers, and engineering executives. We've heard the gripes and complaints from technical team members who say, "Why does our company keep promoting technical experts who don't know how to lead people?"

We get it... and we want to help.

## We really do give a darn

Both of us have been technical leaders in our own disciplines. Jessica creates training strategies for manufacturing companies.

Jim used to set up online learning systems for entire companies and has also led teams of instructional designers. We've both worked as formal managers in leadership development organizations, overseeing the curriculum for thousands of leaders.

Above all, we firmly believe that people give their best effort, dream up their best ideas, and live their best lives when they have a leader who genuinely cares about them and creates an environment where everyone can thrive and grow. We are dedicated, personally and professionally, to helping develop the kinds of leaders who create these environments. This book is just one of the many ways we have tried to make that happen.



## The Blackbook

What do a spy, a bookie, and a playa have in common? Their little blackbook.

A blackbook is where someone keeps the secrets, resources, and references that help them be successful. Hey, Nikola Tesla had a blackbook. When he died it became a national security asset (true story).

The *Technical Leader's Blackbook* is a set of quick-reference resources and tools to help new, and even seasoned, technical leaders be successful in their job. But don't keep it a secret, share it with anyone you think needs it.

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# How did I get here and what am I doing?

I was the only person in our organization who knew just how screwed we were.

I had joined the instructional design team for a new training systems program and had asked to see the contract deliverables. One of the line items that jumped out at me said, "Deliver a Learning Management System (LMS)."

I'd worked with LMSs quite a bit in my previous job and was familiar with their complexity and high cost. I asked the contract focal how much money we allocated for this LMS. He said none. That was going to be a serious problem. But, surely, we already had a plan in place for it, right?

I next asked my team lead what system we were going to use or if we planned to build one from scratch. She directed me to the Software Engineering team because she thought they were responsible for it. The guy there said they had a place in their architecture for an LMS, but he didn't really know what it was. He told me to visit the Systems Integration team. They told me they had heard of an LMS but thought the Simulation Design team was in-charge of it. And after talking to their lead, she thought my own Instructional Design team was responsible for it.

So here we were. We had to deliver a system which usually costs about US\$100,000, but we had no money allocated to it, and everyone thought someone else was responsible for it.

Yeah, we were screwed. And I was the only person who understood why.

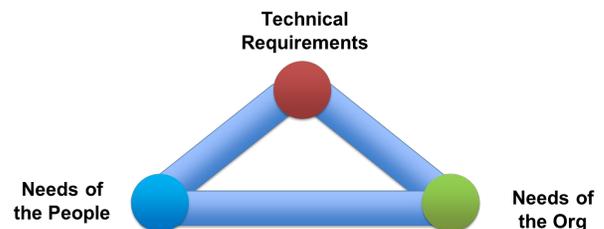
When I brought all of this up to my manager, he said, "Well, Jim, how would you feel about leading a team to go figure this out?" That wasn't the response I was expecting, but I reluctantly agreed.

Two weeks later I was sitting in a room with engineers, software developers, and procurement people all looking to me to lead a team. My only authority was my prior knowledge and expertise with these systems. But I wasn't going to be the person DOING the work, I was the person LEADING the people who would do the work.

I was a technical leader.

Just like that, I was now responsible for not only ensuring we met the technical requirements for the project, but I also had to build a team, create a plan, manage the project, run regular meetings, communicate with stakeholders, motivate team members, negotiate new contract requirements, and coach and develop team members about the technical aspects of the job they needed to do.

The challenge with being a technical leader is that your technical expertise is not enough. You are now balancing three things: **Needs of the People, Needs of the Organization, and the Technical Requirements of your Statement of Work.**



Each of these elements is critical and interfaces with the other two. Emphasizing one element too much may cause the other two to fail. And since technical leaders do not always have management authority, giving direction requires facts and data to support your reasoning. Effective technical leadership means constantly assessing if enough attention and effort are being given to all three elements.

And there's one more element to be aware of to keep everything in balance: You

# Being a technical leader

## Needs of the People

No project ever built itself. It takes people.

Technical leaders often feel most uncomfortable with this aspect of the job. This is particularly true if you were promoted on the same team you worked on and now all of your previous peers are reporting to you.

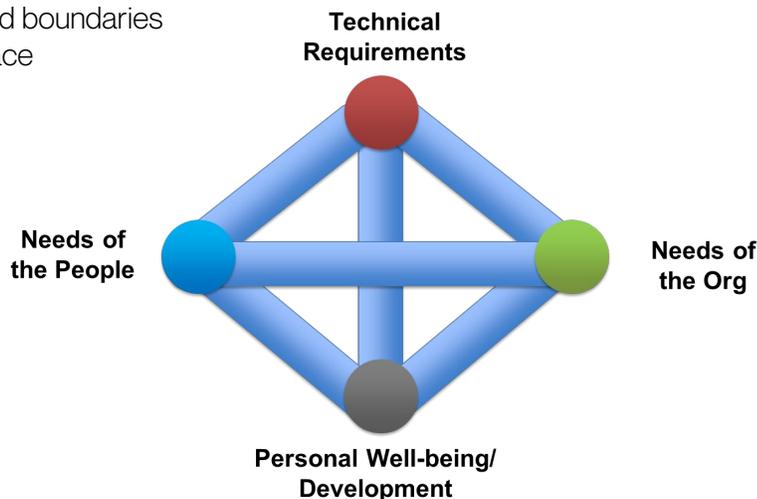
People need:

- Assurance and encouragement
- Training and development
- Guidance and direction
- Autonomy and boundaries
- Time and space

## Technical Requirements

Most technical leaders were put into their role because of their expertise and experience with the job. They usually know the most about the nuances and intricacies of the work. They may not have a specific role with quality, but they know what 'good' looks like and how to get there.

The challenge with this element of technical leadership is learning how to communicate the details in the right way, to the right audience.



## Personal Well-being / Development

There is an additional dimension to this structure. Your personal wellbeing and development. As a technical leader, you have to take care of yourself. Being the person who likely understands how everything works also means you will likely work more hours than required to make sure everything is right.

But many people are counting on you to provide technical direction, come up with creative solutions, and see what is ahead. Keeping yourself well rested and developing your own capability are necessary for the success of the project.

## Needs of the Organization

Everyone likes to get paid. And to do that the organization either needs to make money or operate within their budget...likely both.

This element of technical leadership means being aware of labor time, materials costs, and even overhead. You may need to learn to negotiate with suppliers to ensure the needs of the project are completed within the allowed budget and schedule. Or, you must argue for additional resources in order to meet technical needs. Stakeholders are relying on you to keep the project within the schedule, budget, and scope requirements.

## So, how do I use this thing?

This self assessment is meant to help uncover your own areas of strength, how to leverage them, and when to partner with someone else.

Circle your response to each statement. There are no 'right' or 'wrong' answers, and you can revisit this with each new project, team, or role change! So, use a pencil.

**Always:** you feel or behave that way all the time.

**Often:** you feel or behave that way most of the time, but not all.

**Rarely:** you feel or behave that way infrequently.

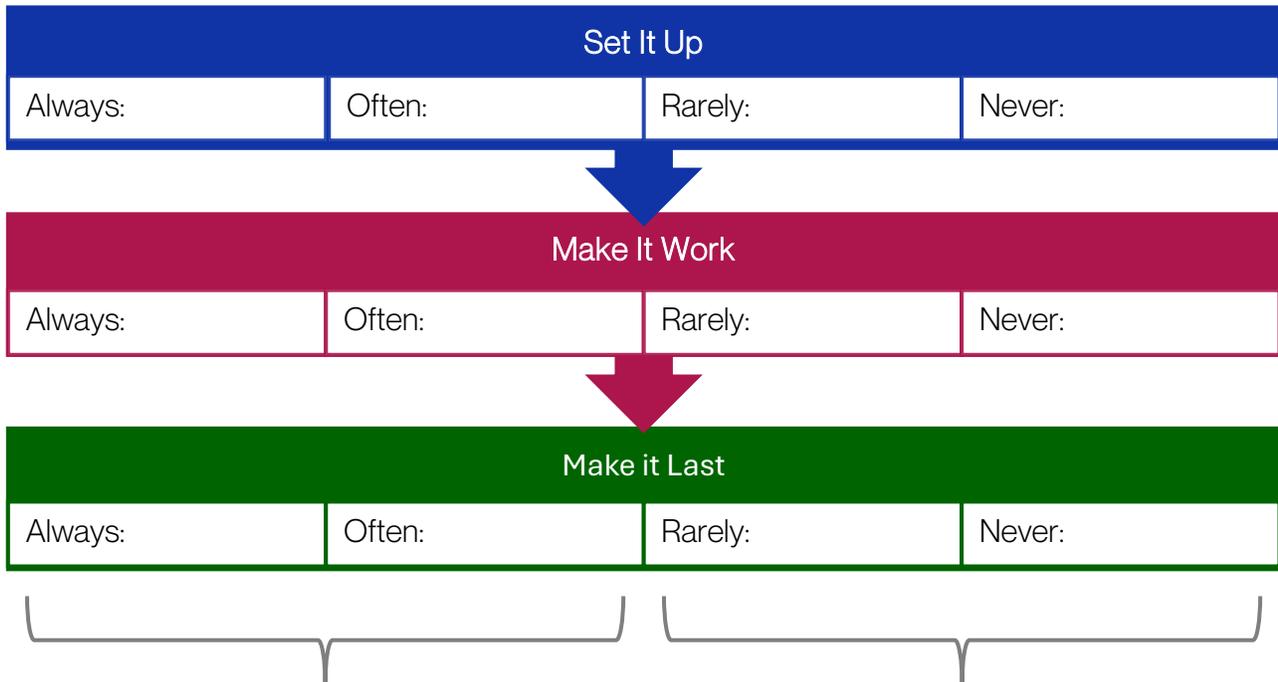
**Never:** you do not behave or feel that way



I am able to convey complex topics in simple language	always	often	rarely	never
I am told that I am a good listener	always	often	rarely	never
I easily adapt my communication style depending on others' needs	always	often	rarely	never
I find it easy to talk to most people	always	often	rarely	never
I feel like asking questions comes naturally to me	always	often	rarely	never
I am able to accurately evaluate what skills are needed for a project	always	often	rarely	never
Outlining and building a project plan comes naturally to me	always	often	rarely	never
I feel comfortable providing negative feedback when needed	always	often	rarely	never
I make observations without judgments or assumptions	always	often	rarely	never
I am able to provide specific feedback	always	often	rarely	never
I feel comfortable resolving most conflicts	always	often	rarely	never
I am able to provide timely follow-up	always	often	rarely	never
I feel comfortable when others show emotion	always	often	rarely	never
I feel that I have adequate time for all my tasks	always	often	rarely	never
I feel enthusiastic about learning something new	always	often	rarely	never
Transitioning work feels exciting to me	always	often	rarely	never
I have opportunities for personal improvement	always	often	rarely	never
I am able to leave work at work	always	often	rarely	never

Now that you have completed the assessment, tally up your results. Count the number of each response type aligned to the colored areas.

The colors correspond to sections of this book. Depending on your strengths or needs, you can look up quick references to improve your job.



**Augment your strengths**

If you have high scores of 'Always' or "Often" for the different colored areas, that's great!

You might want to briefly review some of the concepts and tools in this book to keep yourself sharp.

**Meet your needs**

If you have high scores of 'Rarely' or 'Never' for the different colored areas, then you have some awesome opportunities to learn.

Review the sections where you see the biggest learning opportunities.

**SET IT UP**

- Basic concepts and tools for getting started
- Important things to remember when you begin in a new role.

**MAKE IT WORK**

- How to keep work moving along
- Learning to work with people

**MAKE IT LAST**

- Keeping yourself sane in the chaos
- Things to consider as you hand off your work to a new technical leader

Revisit this guide as a check-in during your projects, as a troubleshooting guide, or as a step-by-step handbook for every new project.

# How to talk to people who don't know what you are talking about

**Remember:** Communication is NOT the most important part of a relationship... it is the DESIRE to communicate.

There are many people and groups who need to hear from you about your project or initiative. But what each person needs from your communication is very different. Sending a blanket email to everyone involved could actually create more problems than it solves. Understanding your audiences' needs helps you be a much better communicator. You need to communicate Up, Down, and Across.

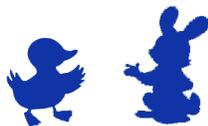
## Across (Peers, Support Groups)

Peers and support groups need to be aware of the opportunities where they can assist or the risks and issues which could impact them. These groups often create the greatest opportunities for cost savings because they will be aware of resources you are not.

Communication topics:

- Project status and schedule
- Tie-in points between your team and theirs
- Potential risks that could impact them

## Ducks & Bunnies



When communicating with executives, always remember "ducks and bunnies." They don't need all the details, and they won't necessarily understand the nuances. Pretend you are talking to a six-year old child. Keep it short, show cool pictures, use simple words, and they'll think you're a genius. Seriously!

## Who is your audience?

### Up (Stakeholders, Clients, Senior Leaders)

Stakeholders and clients are looking ahead. Will the project be completed on-time? Are you on-budget? What risks and issues are you facing? What resources does the team need to be most successful? Imagine you are their source of information for predicting the future.

Communication topics:

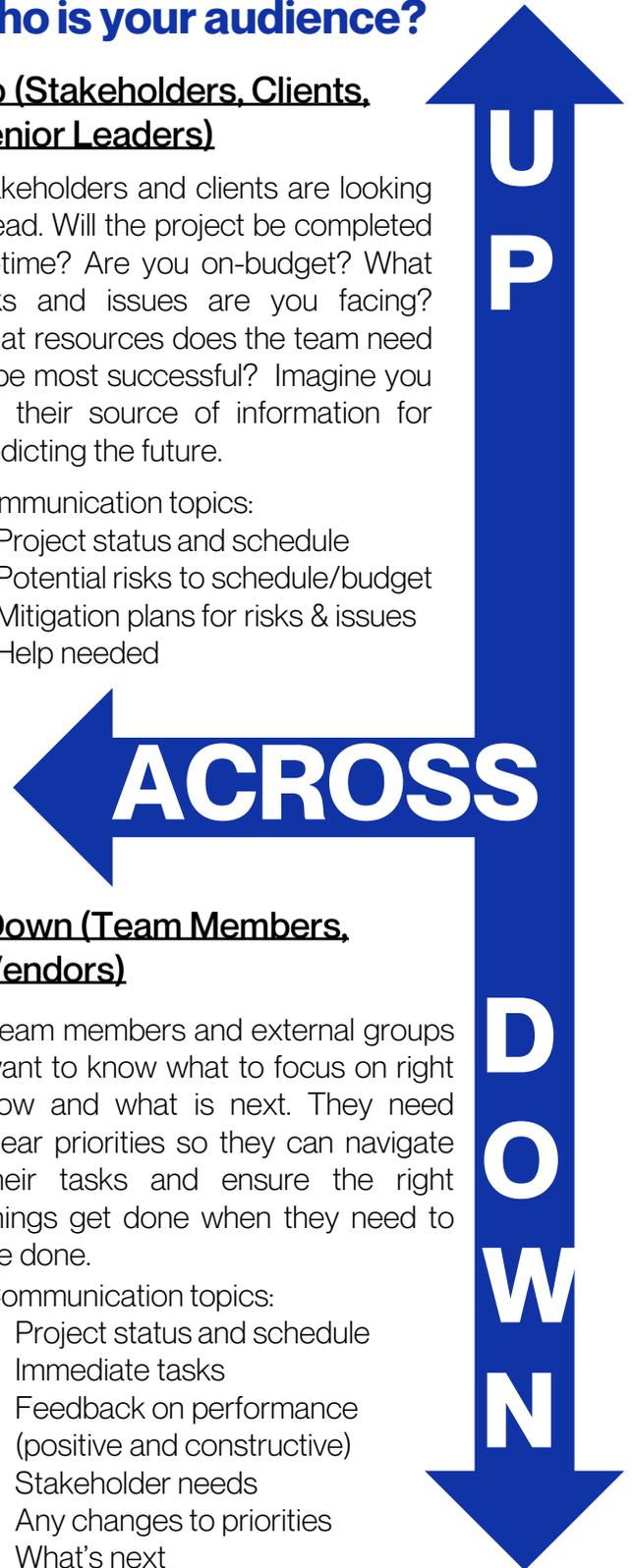
- Project status and schedule
- Potential risks to schedule/budget
- Mitigation plans for risks & issues
- Help needed

### Down (Team Members, Vendors)

Team members and external groups want to know what to focus on right now and what is next. They need clear priorities so they can navigate their tasks and ensure the right things get done when they need to be done.

Communication topics:

- Project status and schedule
- Immediate tasks
- Feedback on performance (positive and constructive)
- Stakeholder needs
- Any changes to priorities
- What's next



# BOTTOM LINE UP FRONT

Your audience's time is as valuable as yours. When communicating, be sure to address the issues which concern them most. Leave the details for later (eg follow-up phone call, back-up slides, etc.). A short list of bullet points or key facts and figures are most effective.

## Effective

This message contains status updates and a review of potential project risks.

- We were a day off schedule last week due to a team illness, but we are back on plan.
- A regression test identified 2 unexpected bugs in the code. We are working to fix the bugs and retest by tomorrow.

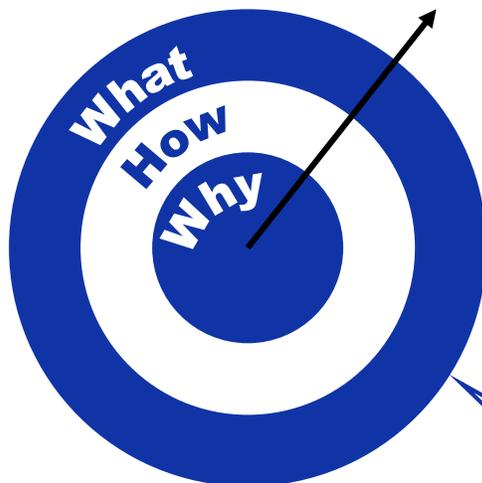
Short, sweet, and to the point

## Less Effective

I'm writing you today to talk about what's been happening on the project and some of the issues we've run into. Just to give you a little background, the schedule says we were going to be running a regression test last Tuesday. That got pushed out due to a team member who got sick, but we were able to run it on Wednesday instead. The test was okay, but we did notice some abnormalities with our settings which we decided were created by a configuration

You lost me at "a little background"

# START WITH 'WHY'



**The Golden Circle**  
by Simon Sinek

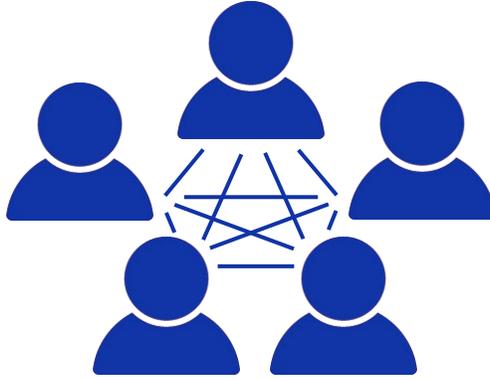
Leadership thought leader Simon Sinek explains that people are not motivated by What they are supposed to do but by Why they are supposed do it.

When communicating, effective leaders start with Why. This approach helps team members harness their own creativity to solving problems rather than being told to What to do and How to do it.

Our user testing shows that people get confused about how to fill out this part of the app. We need some kind of feature that clarifies what information to type in.

# How to get the people you want, keep the people you have, or get-along with those you can't get rid of

There is more work than you can possibly do yourself, so you need a team. Teams that have the right skills and work together well can do incredible things. Building and developing your team will be one of the most



important things you do. But that is easier said than done. Not everyone will have the needed skills and not everyone will be motivated to do the work or get along with each other. Here's how to at least get started.

## Outline the skills that are needed to reach your goals

Take time to envision what success looks like when your project is complete. What do you need to get there? Consider the strengths and skills that you have and the role you play in the team. Where are your own gaps? Who or what is needed to balance you?

## Tell your story so well that others tell it for you

A great story will rally people to your cause! Leverage the Bottom Line, Up Front approach from the Communication section of this book. Practice your pitch, share it with everyone! A 60-word or less pitch should inspire curiosity, and it must be both clear and concise enough for others to repeat it.

## Leverage the strengths of those around you

Intentionally make the time to get to know those your work with at the human level. Understanding their values and aligning their strengths to the work ahead will help everyone to be at their best. As you are learning about your individual team members, consider which role they would fit best in. These conversations should be two-way and transparent. Ensure you discuss with each individual both what they think their strengths are AND where you think they can offer the most value.

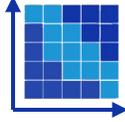
## Empower the team

Once you have assigned all the roles on the team, bring everyone together (in-person or virtually) to establish team working agreements. This step is often missed, which causes confusion, lack of role clarity, and inconsistency. Critical points in the discussion should be: how the team will communicate, decision making, roles and responsibilities, goals/timelines, work styles, and how the team will resolve conflict. Document the outcomes and revisit them as needed to re-align to goals. Working agreements can often evolve as the team becomes more (or less) connected.

# How long, how much, how many...baby-steps for World Domination

Your first project(s) can be overwhelming, and you need a plan so everyone knows what's going on. At the very least, you need four pieces of information to start your plan and then track them throughout the project.

A Project Management Professional® PMP certification is a recommended credential for any technical leader. It will provide you with many of the common terms, processes and tools which Project Managers use.

<p><b>Schedule</b></p> 	<p><b>Resources</b></p> 	<p><b>Budget</b></p> 	<p><b>Risks/Issues</b></p> 
<ul style="list-style-type: none"> <li>- When does the project start and end?</li> <li>- What are the milestones and what phases or parts of the project will be completed when?</li> <li>- What are all of the tasks that need to be performed for each part and phase?</li> <li>- What development approach will you use? User-centered design, waterfall method, Agile method, etc.</li> </ul>	<ul style="list-style-type: none"> <li>- What skillsets are needed to complete the project and when are they needed?</li> <li>- Who will perform which tasks?</li> <li>- What resources (material, software, tools) are needed?</li> <li>- Which suppliers / vendors will support the project?</li> <li>- Will marketing, communications, supply chain mgmt., or distribution need to be involved?</li> </ul>	<ul style="list-style-type: none"> <li>- Based on the people involved and the duration of their tasks, what is the estimated cost of labor?</li> <li>- Based on the needed suppliers, materials, tools, etc. what are the non-labor costs?</li> <li>- Is more budget required for other functions? (marketing, communications,)</li> <li>- What percentage of the budget is needed for management, overhead, and risk?</li> </ul>	<ul style="list-style-type: none"> <li>- What are the current issues the project is facing?</li> <li>- What are the most likely risks you foresee with the project?</li> <li>- What is the likelihood and impact of each?</li> </ul> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Issue:</b> It's a problem now and needs to be dealt with.</p> <p><b>Risk:</b> It could be a problem and we're trying to avoid it.</p> <p><b>Mitigation:</b> What we'll do about it.</p> </div>

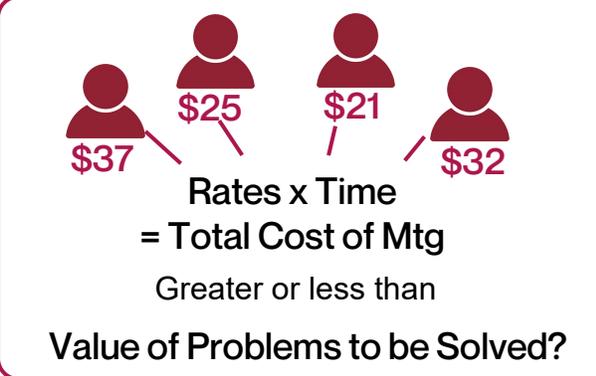
Good project managers keep track of the details for each of these items and are always thinking ahead for how they will deal with potential problems.

**Remember:** No project EVER follows the original plan. Project management is figuring out how to adapt WHEN problems happen.

# So. Many. Meetings. And everyone thinks I should run them

## Meeting ROI

Look at meetings from the perspective of return on investment (ROI). If you add up the cost/hour of each person in the meeting times the length of the meeting, would the discussion or problem-solving in that time provide the same or more value back to the project or program?



$\$37$     $\$25$     $\$21$     $\$32$   
**Rates x Time**  
**= Total Cost of Mtg**  
 Greater or less than  
**Value of Problems to be Solved?**

Pulling a whole team together needs to have meaning, purpose, and value. The more prepared you are for the meeting, the better it is likely to go.

## Meeting Agenda

Remember, if someone does not need to be part of a meeting, then the meeting is a waste of their time... and possibly yours as well.

If you schedule a meeting, particularly with stakeholders, always include a purpose and a rough agenda. Be clear about the meeting outcomes, what will happen in the meeting, how long you anticipate each activity to take, and who will be involved in each.

Be flexible with people coming late or leaving early, if they do not have to be there. Imagine everyone has a choice about attending or not. If they see the meeting has value, they will be much more engaged.

## Flowdown & Status are for Software

So much time is wasted in meetings with people giving flowdown (messages from higher-ups) and reviewing the status of projects. Save that information for a software tools like Slack, Discord, Teams or something else.



**YES**



**NO**

Create a discussion group or persistent chat area for all this stuff. It is up to everyone to be aware of the flowdown and status. If there are questions, use the tools to ask and answer them so the information is captured and does not have to be discussed in a meeting.

## Who is in-charge of the meeting?

Let's face it, if you're running the meeting, it is much harder to listen and pay attention. As the technical leader, your input is important, so listening and participating is valuable.

If possible, have a Project Manager run the meeting. If not, assign someone to be a timekeeper to keep everyone on task.

### Sample Meeting Invitation

The purpose of this meeting is to plan our next development sprint.

Agenda:

- Review outcomes from previous sprint. (Raj – 10 min).
- Define sprint goals. (Karin – 20 min)
- Review team capacity. (Ana B – 20 min)
- Assign work. (All - 5 min)

# Getting everyone to do what they are supposed to when you're the one in-charge

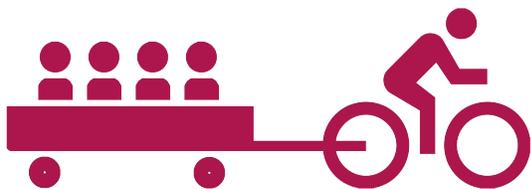
## The Leadership Paradox

The sign of a good leader is that their team leads itself.

### Heroic Leadership

Technical leaders are often selected for their role because they have the most experience with the team's processes or products. Therefore, it would stand to reason that they should make the majority of the technical decisions. But that also means the team can only go as fast as the leader is available to answer questions, capable of understanding the problems, and aware of all the issues surrounding it. The leader becomes the single point of failure.

That actually slows the team down.



It might seem counter-intuitive that if there isn't one person in-charge, then everyone will do their own thing. Isn't the leader the one who makes the final decision? Shouldn't the leader be the one making sure everyone is aligned and doing what is necessary to complete the project?

### Team Leadership

It falls on the leader to create the environment and boundaries where teams can operate on their own. But then the leader must step back and let the team members lead themselves within those boundaries. This is hard when you want to solve the problems yourself.

Teams that learn to lead together actually go faster...and are more innovative...and can adapt to new situations more quickly.



## Promote team leadership

**This is OUR team:** Emphasize that the team's success or failure happens together, not as the result of a few individuals.

**Get feedback:** Finish meetings, sprints, or other activities with each team member submitting "What is working?" and "What isn't working?" with regards to working together. Lean into tensions they bring up. Get comfortable with uncomfortable conversations.

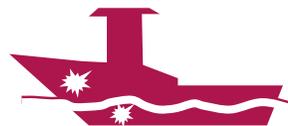
**Make it 'Safe to Try':** When someone proposes a solution, give everyone a chance to provide feedback with a focus on "What would make it safe to try and learn from?"

## The Waterline

As a team, determine what decisions the team can make on their own and which require the leader. Use the 'waterline' analogy.

### Above the waterline

If a boat gets a hole above the waterline, it isn't going to sink immediately. The team can make decisions that won't cause severe damage if they go bad.



### Below the waterline

If a boat gets a hole below the waterline, it is in immediate danger. Certain decisions may have severe enough consequences that the leader must be involved in the decision.

Adapted from *Brave New Work* by Aaron Dignan.

# The How-To guide for when nobody does what YOU think they should be doing

Working with other humans can be... hard... (no that's not the word)... challenging... (no, hmmm... oh, yeah)... Hell. Working with other humans can be Hell. (okay, not always)

High stakes and compounding stress can bring out the worst in us. It is easy to make assumptions about what your team can do or should understand.

It is important to create a working environment where everyone on the team feels safe to ask questions. A technical leader may have the expertise needed to complete a task, however, their role on the team may require them to communicate what they know to a team member who does the work.

The most common types of issues you will face fall into four basic categories:

- Personality conflicts
- Unclear boundaries
- Miscommunication
- Scheduling / Resource Management

Use this chart to troubleshoot some of the common issues you will encounter.

## Mindsets that get us into trouble

When we look at a challenging situation, our own biases and mindsets can get in the way of thinking rationally about what to do next. As you recognized these false mindsets, train your self to troubleshoot the situation.

## Personality Conflicts

I despise you and everything you stand for.

Have you tried to have a civil conversation?

## Unclear Boundaries

You're supposed to be doing X, why are you doing Y?

Do you have documented roles and responsibilities?

## Miscommunication

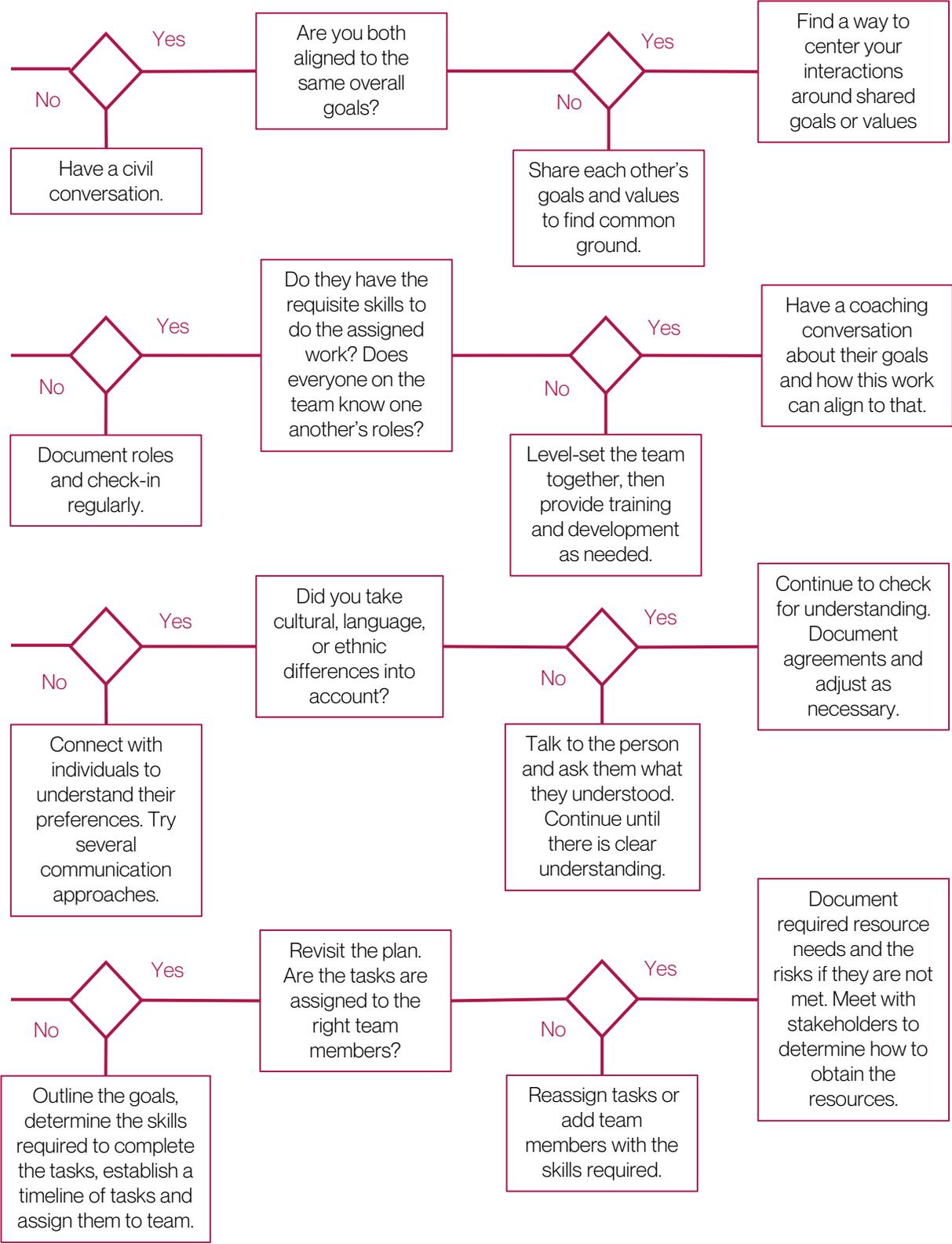
Wasn't I clear about what we're doing?

Did you communicate in multiple ways? (email, phone call, face-to-face)

## Scheduling / Resource Management

Yeah, there's no way this is going to work with what we have.

Is there a clear plan already in place?



# How to avoid being the smartest person in the room

YOUR job is much easier when everyone has the skills and knowledge to do THEIR job.

As a technical leader, when people will come to you for advice and expertise, it feels good. But if you're always the person with the answers, what happens if you must take a day off or want to go on vacation or holiday?

### Always be training your replacement.

Far too many technical leaders make their technical knowledge part of their work

identity. Being the expert with a particular tool, system, or process gives a sense of job security and indispensability. And when tools, systems, or processes change, there can be a sense of losing one's identity or value.

But a technical leader who makes it their goal to help everyone else become an expert, truly becomes indispensable to the organization.

Here are ways to help your team develop their knowledge and skills to be more expert.

## Where knowledge and experience come from

### Formal Learning

Technical jobs usually require formal training or schooling, and that learning should never stop. Formal learning provides insights into better ways for people to do their job. Industry best practices change how people see the ways they do their work. Plus, formal credentials can help get that next job.



Formal learning methods:

- Degree/Certification programs
- Conferences, trade fairs
- Continuing education credits
- Professional development
- Training workshops
- Books, journals, trade magazines
- Online, in-person training classes

### Collaborative Learning

People constantly learn from each other. Having formal mentorships or informal workshop allows colleagues to share what they know and grow their knowledge together. Collaborative learning provides insights that go beyond not just how to do the job, but how to do the job better.

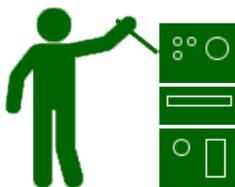


Collaborative learning methods:

- Mentorship, apprenticeship
- Communities of practice
- Lunch and learn sessions
- Workshops, hackathons
- Performance coaching
- Group projects

### Workplace Learning

Most of what we know and learn happens on the job itself. Practice, reflection, and more practice are the most effective ways to build expertise. Being intentional about that learning process can also accelerate the time to proficiency.



Workplace learning methods:

- On-the-job training
- Demonstration videos or job aids
- Debriefs, after-action reviews
- Quality or safety stand down events
- Policy, procedure, process documents
- Benchmarking

## Cross-Training Matrix

Let's face it, you will have to work through disruptions. Someone will be sick, a team member will be pulled off the project, or a key person might quit.

In times like these, it is very helpful to have a cross-training matrix that lists who has the necessary skills to perform certain tasks on your team and ensures there is coverage.

### Team Skills Proficiency Chart

	Cell growth	Bio reactor	Capture	Viral clearance	Inoculation
Troy	x	t	x	x	
Bitha		x	x	x	x
Raj	x	t	t		x
Holly	x		x	t	t
Nuno	n	x	n	x	

x= Qualified  
t= in Training  
n= Needs training

The matrix also provides visibility about who is qualified for certain tasks, who is currently in training, and who might need training.

Keeping the matrix visible on a board or reviewed in regular meetings helps the team recognize where they have opportunities for growth and development or where the team might be at risk for certain tasks if something were to happen.

## Skills Proficiency Chart

A skills proficiency chart is also useful to see everyone's proficiency level with different tasks. Troy, Bitha, and Holly might all be qualified for Capture, but who is the most experienced? Who is the go-to person when something goes wrong with that task?

## Team Skills Proficiency Chart

	Competent	Independent	Proficient
Cell growth		Troy	
Bio reactor	Nuno	Bitha	
Capture			Bitha
Viral clearance		Holly	
Inoculation		Bitha	Raj

Each task is divided into 3-5 categories of proficiency. The simplest versions of the proficiency levels are as follows.

- **Competent:** Is familiar with the task and can perform under supervision.
- **Independent:** Has experience with the task and can perform without supervision.
- **Proficient:** Considered an expert, can teach or qualify others to perform the task.

Having the chart visible also provides incentive for team members to continually improve their proficiency level.

### When to ask for training & development funds

**Pro Tip:** Companies which offer funding for training and professional development, set up their budget at the beginning of their fiscal year based on what the training needs are. This is the best time to request training funds for yourself or members of your team.

But, usually about ¾ of the way through the year, companies reassess how much they've spent and often there is a little bit more money left than expected. This is a great time to request additional training funds. The leaders need to spend it, but they don't want to tell everyone. If you quietly ask if there is more available, there's a good chance you can get the funding.

# Doing hard things without killing yourself in the process

The *Technical Leader's Blackbook* highlights the need for checking in with stakeholders, team members, and customers to ensure things run smoothly. But how often do you check in with yourself? As a technical leader you have a lot of responsibilities balancing the needs of projects and the needs of those around. Those responsibilities might feel more important than your own needs. Consider the items below and give yourself a point for each item you have experienced while in your role.

- Took on an additional task that was not assigned to me
- Skipped lunch or a break to finish a task
- Stayed late or arrived early to finish a task
- Missed an event/activity with family or friends to complete tasks
- Found myself feeling anxious about starting or finishing my work week
- Ate meals at my desk while answering emails or attending a meeting
- Felt overwhelmed or unsure of where to start or what to do next
- Struggled with "turning off my thoughts" at bedtime
- Found myself feeling angry or short-tempered with those around me

Total Score: \_\_\_\_\_

**0-3**

You're doing a good job with maintaining your wellbeing. Review the suggestions on the next page for additional practices you could incorporate.

**4-6**

You have opportunity for improvement. Take time to consider what you might need for better balance. Start small and set a goal of one healthy habit and build from there.

**7-9**

It's time to make changes to help better manage yourself. Take time to reflect on what is most urgent for your wellbeing. Be open with those around you as your work to build new, healthy habits.

## Taking the first step

We have all heard the phrase “put on your own oxygen mask before helping others.” However, many technical leaders feel as though they need to be the superhero which often leads to self-sacrifice and burnout.

These mindsets can end up doing more harm than good, even if they are subconscious. There are three critical components to strengthening your resilience. As you consider each, start to determine where you might need the most support.

### Courage

Making changes, especially those that seem different from existing norms, can be scary. You may need to make adjustments in small increments or test out different approaches until you find what works best for you.

### Vulnerability

You will need to be vulnerable with yourself and those around you. Ask for what you need to be successful. Take time to reflect on when you feel the best, most creative, and productive. What does that look like?

### Trust

As you start to build new habits and make adjustments, trusting those around you can be intimidating. You might feel shame around needing help or support from others. Be kind to yourself. You may need to delegate more tasks or set boundaries around important practices. As you model these behaviors you will need to trust the process. Seeing results can take time.

## Habits to Increase Your Wellbeing

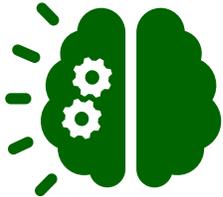
Scientific studies have shown that different stressors have different impacts on your brain and body. As a result, different habits will support your wellbeing in various ways. Consider what you might need to provide better balance.

<p>Ensure that you are intentionally hydrating throughout the day to increase your energy levels and improve your brain function.</p> <p><b>Drink Water</b></p> 	<p>Step away from work and go for a short walk. This helps you clear your head and reprioritize. Being outside also reduces stress related hormones.</p> <p><b>Go for a Walk Outside</b></p> 	<p>Take time to identify things that you are grateful for. This practice helps you to put more focus on positives and increases resilience.</p> <p><b>Practice Gratitude</b></p> 	<p>Proper amounts of sleep have multiple benefits including better brain function, increased performance, and reduced stress.</p> <p><b>Get Plenty of Sleep</b></p> 
<p>Be intentional when you eat. Multitasking reduces awareness of what you are eating. Step away from work to enjoy your meals and make healthier choices.</p> <p><b>Eat Healthy Food Choices</b></p> 	<p>Planning time is rarely accounted for in tasks and projects. This step of the process help you to think through the work and be more strategic.</p> <p><b>Take Time to Plan</b></p> 	<p>Using mindfulness strategies helps you improve your focus, reduce anxiety, and manage stress. Building in a few minutes per day has a positive impact on your wellbeing.</p> <p><b>Practice Mindfulness</b></p> 	<p>Workplace relationships are just as important as those with your friends and family. Strong relationships boost empathy and help improve communication.</p> <p><b>Building Relationships</b></p> 

**What will you incorporate into your day?**

# How to let go and know your baby will be safe

Making transitions to a new role can bring out mixed emotions. Some feel excited and ready for the next project, while others struggle with letting go of their statement of work (SOW). Each transition is a unique situation, but there are a few things that you can do to make it a positive experience.



### **Keep a positive mindset.**

Approach the transition as an opportunity to move on to your next challenge and continue to grow your skills.



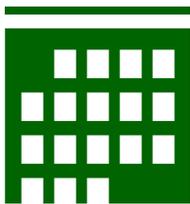
### **Map out the plan for the transition.**

Highlight the critical elements for knowledge transfer and outline the skills required for sustainment of the work.



### **Document. Then document more.**

You and your team are the keepers of history and knowledge on the work. Ensure that requirement assessments, project plans, customer requests, after-action reviews, and processes are clearly documented.



### **Build a transition schedule.**

Work with the receiver to create a schedule with milestones for transition. Focus on small pieces with each milestone, to ensure stability in the process. Be agile with the schedule and adjust as needed.



### **Communicate. Communicate. Communicate.**

As you navigate the transition, communication is critical. Check for understanding and alignment to the goals of the project. Create space for questions and be open to them. Ensure stakeholders are well informed along the way.

Following these best practices will help to support success. However, the last remaining piece of the puzzle is trust. You need to trust that you have done the best you can to sustain the work. Be flexible as the work continues to evolve, and trust the new leader is doing their best... even if they do things differently than you.

## Seriously, who are these people?

### James (Jim) Hadley, PhD



Jim has spent over two decades designing, developing, and delivering training. He has designed training programs for the military, government organizations, as well as aerospace, pharmaceutical, manufacturing, and food service industries. His passion is designing simulation-based leadership courses which push leaders to become better people, because he firmly believes that good people become better leaders.

He possesses a doctorate in Education, Masters degrees Business Administration and Instructional Technology, and a Bachelors degree in Broadcast Communications.

In 2018, he founded Simthing New, LLC, a leadership development company focused on values-centered leadership, simulation-based learning, and data-driven insights. He resides in Utah, USA, and loves the outdoors, singing, and taking trips with his wife and four children.

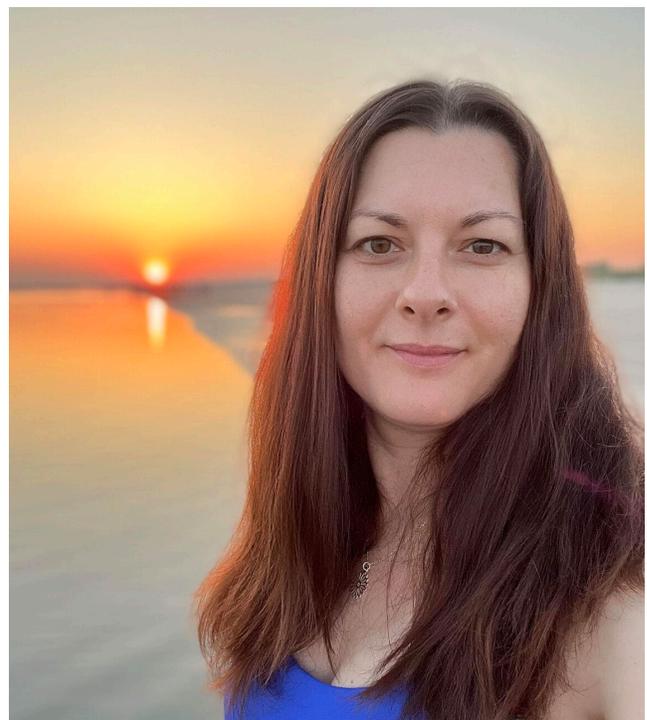
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Jessica has helped hundreds of leaders all over the world thrive. Her passion is helping individuals and teams align their values and unlock their potential through strengths-based living, leading, and working.

She has a special passion for helping technical leaders (aka nerds and geeks) become awesome leaders. She has designed Technical Excellence courses for IT and engineering technical fellows in aerospace, as well as designed strategic curriculum for first-line leaders in engineering and manufacturing.

Jessica spent two decades working with diverse populations to develop data-driven approaches for person-centered and creative problem solving. Her emphasis on human skills helps technical leaders excel in an ever-evolving workplace. She resides in Washington, USA, with her husband and two dogs.

### Jessica Johnson



*There is no difference between technical leadership and regular leadership, except the burden of having to know what you are talking about.*

*- James A. Hadley, PhD*

The *Technical Leader's Blackbook* is an indispensable resource for technical leads, team leads, product managers, and supervisors in technical and creative industries. It is a ready reference for any technical leader, with best practices and effective tips for leading people, projects, and teams.

This guide provides easy-to-use tips for getting started as a technical leader, making projects efforts more effective, working with teams and stakeholders, and troubleshooting the challenges that come with being a new technical leader.

It is a handy reference for those 'oh crap' moments.

