





From Colleague to New Leader: Managing Relationships After a Promotion

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LEARNING OBJECTIVES

1. Determine how to establish one's leadership role through engagement
2. Describe methods that promote consistent and fair treatment
3. Identify how to manage colleagues and friends most effectively

Congratulations—all your hard work has finally paid off and you have been promoted to supervisor or manager.

Although you are likely elated by the news, your inner voice may start doubting your abilities and questioning, *How am I going to do this? What will my former teammates say to me? Will they even listen to me? Will they allow me to lead them when I used to be part of their group? Put simply, how will I manage my friends?*

Thinking about all the improvements one wants to make as a new leader is exciting. Before implementing any changes, however, it is essential to first focus on what it means to become a supervisor or manager, especially over people who have known you for years in a non-leadership role. Perhaps a longtime friend is ready to support, defend and do whatever it takes for your success—or there may be some former teammates who consider you to be lucky or disapprove that you were appointed as their new leader. Whatever the case, it is important to recognize the uncertainty of the department. Addressing it is the first step to becoming an effective leader. Pay attention to those established

relationships and be aware that there may be some people who are feeling resentment or anger that they were not chosen for the job. Make the effort to treat all staff members equally, regardless of personal feelings or history with them. It is important to remain polite and instill a sense of teamwork, all while maintaining a healthy personal distance with staff. This, however, does not mean a new leader should become distant or unconcerned with staff members' feelings or needs. To the contrary, it is important to treat people as you did previously and carry that positive approach into the day-to-day management style. By doing this, this you will help demonstrate that although you are now in a leadership position, you remain the same person you have always been.

Objective 1: Determine how to establish one's leadership role through engagement

It is imperative for leaders to be clear about their expectations from the start. It is prudent to start the transition to leadership by holding one-on-one meetings with all new reports. One-on-one meetings allow leaders to share their vision for the department, lay ground rules and expectations for staff behavior,



and give staff members the opportunity to express their needs or concerns.

Leaders should start the conversation by describing where they envision the department going. That vision helps staff members feel more positive about the leadership. It's okay for the new leader to be missing some of the details and not immediately have all the answers. Staff members are great resources and leaders will benefit by reminding employees that their help is needed to make a successful, team-driven department. Leaders must recognize the abilities and strengths of each staff member that will help the department reach its vision.

Next, leaders should describe the rules of engagement, including expected behaviors and those behaviors that will be deemed unacceptable or intolerable. Leaders may include which topics to discuss privately and which are appropriate for a group setting. It is important to let staff members know that setting the rules of engagement and the tone of the department is all about them. Because newly promoted leaders know the team well, it is important that they let each employee know how he or she can contribute to make the department a great place for all.

When a new leader is in charge of a close friend, the situation can create uneasiness in the relationship. One study showed that 70% of first-time managers lost their work friendships following the promotion (Laker, 2020). It is very important to set the rules of engagement for oneself and the friend; this includes discussing how both individuals feel about the change in the power structure. Leaders should describe how they will act as a manager and give time during their meetings for the friend to process the changes. Setting boundaries is important and the

following are some points to consider for instilling those boundaries:

- Ensure that work and home discussions are kept separate;
- Avoid discussions about personal plans during work hours; and
- Agree to not share departmental information.

Note: It is important to remember that today's world is more connected than ever, and social media posts and engagement can give the appearance of favoritism. It may be necessary to limit public social media with co-workers and work friends. Work information shared outside of work should not be different from information shared at work.

Because newly promoted leaders have worked with their staff at a peer level, the leaders will likely have some awareness of their employees' concerns. Leaders, however, should never assume they know everything; they should directly ask employees to express their needs and concerns. Asking the following questions can provide valuable insight:

- What frustrates you about your job?
- Where do you see the department going?
- What are your expectations of me in this position?

Prior to the first team meeting, the new leader should develop a vision for the department and share how they envision attaining it. Equally important, the leader should share how each staff member is critical to the department's success. The individual meetings will establish the new leader as the supervisor or manager, and the first team meeting will set the leadership style.

Choosing a place for the first team meeting is important. It should be away

from active traffic and in an area with minimal interruptions. Leaders should review with the team the department's vision, rules of engagement, and expectations. Adequate time should also be allowed for questions, with the leader answering each question honestly.

Objective 2: Describe methods that promote consistent and fair treatment

Promoting a fair work environment starts with the departmental leader. Leaders decide work schedules, raises and praises. The team judges every action taken by a supervisor or manager, regardless of how small. Since the new leader is a former peer, the team is aware of their typical behavior, communication patterns, and friendships within the department—all of which can create a perceived bias. This is especially true for team members who are not happy with the new leader's promotion.

Fostering a fair and objective work environment can help overcome biases. All decisions made by the leader must be fair and not based on emotions or friendships. Leaders should always keep the facility's needs and department's goals in mind and ask, "Is this decision the best decision for the department?"

Consider this example: A friend in the department is physically exhausted and making mistakes. Overtime becomes available and the friend and another staff member volunteer. Your friend needs the money, but their performance is not up to par with the other employee's. Of the two, the other staff member—not the friend—is more likely to meet the needs of the department. Which do you choose? In this example, the other staff member is the better choice for the department.

Staff members are not going to agree with all of your decisions. Some will



claim favoritism, while friends may claim abandonment by their former friend/new leader. When approached with negative comments, the leader should acknowledge those employees' concerns as valid but share their rationale for the decision at hand. Sometimes, sharing rationale is not enough, especially when it changes with each situation. Documented criteria can make acceptance easier. The leader should refer to written policies and procedures for important discussions around job performance, pay and call offs, for example. Leaders must always remember to treat everyone fairly and equally. If the leader allows a friend to do something, the same rule should apply for all other team members.

Some departmental policies serve as verbal policies, and those can change over time. A policy spoken today may be different from six months ago; therefore, the leader should document verbal policies that concern the entire team.

Favoritism is one side of the friendship coin; the other is misuse of that friendship. Have you ever asked a friend to cover your shift? Most of us have. Friends help friends when asked; leaders, however, should be wary of this habit when they assume the supervisor/manager position. Asking a friend to do a task when no one else volunteers, putting them on the unwanted holiday weekend because they won't complain, or giving them the worst assignment to "keep peace" in the department are all examples of relationship misuse. Just as friends should not be treated with favoritism, they should also not be treated unfairly.

Fairness extends outside the job and the activities a leader does with a work friend matter. Going to lunch with the work friend or chatting in the leader's

office are activities that exclude other members of the team, and this can build resentment. Leaders should include all staff members in activities. If having lunch with a friend, it is important to also invite the remaining staff members, for example.

Objective 3: Identify how to manage colleagues and friends most effectively

As former President John F. Kennedy once said, "Ask not what your country can do for you—ask what you can do for your country." A similar sentiment holds true for Sterile Processing (SP) management. Leaders must ask not what their SP team can do for them, but rather what they can do for their employees and department. Teams succeed because they have vision, resources and people empowered to do the right thing. It is the leader's role to develop that vision, get the resources needed and empower their staff. They must also strive to live that vision. Again, the leader sets the example and tone for interdepartmental communication and behavior. The leader should always do as they want their team to do.

There is nothing more satisfying than having a supportive boss. Leaders must always listen to staff and obtain the resources needed for them to perform their jobs well. Doing so leads to an empowered team.

Newly appointed leaders and their workplace friends can avoid becoming a negative statistic on the friendship front by proactively communicating feelings, boundaries and expectations. Leaders should reassure their friend(s) that decisions made at work do not reflect their feelings toward them as a friend. At times, a leader may find that their work friend challenges their decisions. If this occurs, the employee's

concerns should be addressed the same as with any other staff member in the department.

Discipline is, at times, unavoidable, and it can potentially lead to feelings of shame, fear, resentment or anger—especially when directed toward a friend who may misinterpret the discipline as a personal attack. Leaders should always follow facility disciplinary policies and procedures. The following approaches can help a leader prevent situations where employees feel betrayed, neglected or misunderstood:

1. Address all negative behavior promptly. Allowing negative behavior to continue sanctions it and leads to feelings of favoritism.
2. Give specific examples of the negative behavior.
3. Do not include examples from personal life. If a friend is late for work, don't discuss how they are also late for parties.
4. Ask employees why a situation happened. People, environments and circumstances change, so leaders should never assume they know the reasons. Only by asking can the leader determine the root cause and take the most appropriate actions.
5. Give specific guidance, training, mentoring or other action, as appropriate. If an employee was tardy because of a changed bus schedule, a schedule change may fix the problem; however, if they slept through their alarm, a warning may be appropriate.

Conclusion

Being promoted to a leadership position within the department creates exciting opportunities; however, it can also present some challenges—many of which stem from the newly appointed leaders having new expectations placed on them by their boss, staff and work



friends. Managing friends and former teammates can be difficult at times, but approaching the role with a strong vision, effective communication, and consistent fairness will result in positive outcomes for all.

RESOURCES

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