Transformative Learning and First-Time Managers: How can HRD Practitioners Help?

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The transition to management is one of the most difficult challenges first-time managers face - almost half fail. First-time managers may experience disorienting dilemmas that trigger transformative learning. HRD practitioners can assist in reducing the failure rate of first-time managers when they better understand the challenges first-time managers face and support them more effectively.

Keywords: Transformative Learning, First-time Managers, Transition to Management

Getting promoted is exciting, but making the transition to management is one of the most difficult challenges first-time managers face. Almost half of first-time managers fail (Ameson, 2005). First-time managers have no managerial experience unlike experienced managers, such as Chief Executive Officers (CEOs). Yet, even among CEOs, the failure rate is high. Between 1995 and 2001, turnover among CEOs increased by 53%, CEOs' tenure plunged by more than 23%, and the number of CEOs who quit their jobs under pressure more than doubled (Harvard Business School Press, & Society for Human Resource Management, 2005). Although this high turnover rate for experienced executives provides some indication of the challenges first-time managers face, the challenges first-time managers face occur with greater frequency for them than for more experienced executives (Pearce, 1982). First-time managers are given more responsibilities and may be placed in strategic positions in the organization. Organizations incur training, development, and recruitment costs in promoting or recruiting first-time managers. Yet, providing adequate support for first-time managers during their transition to management is not always a priority for organizations. "While management may talk about training and mentoring support and being patient with mistakes, that isn't what many managers see" (Lancaster, 1998, p. B.1).

The transition to management is the process of adapting to a managerial role following the promotion from an operational or specialist position, to that of a manager. This transition is a life changing experience that impacts both the professional and personal lives of individuals and determines the future of their careers. A career is an occupation that an individual undertakes for a significant period of his or her life that has opportunities for progress (Lindberg, 2002). First-time managers are shaped by their transformational experiences of the first year that forge their leadership philosophies and styles in ways that may haunt or hobble them throughout their careers (Hill, 2007). First-time managers may experience disorienting dilemmas that trigger transformative learning. Disorienting dilemmas are acute internal or external personal crises (Mezirow, 1978), or experiences that cause individuals to question what they previously believed to be unquestionable (Wiessner & Mezirow, 2000). Transformative learning is:

> the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action (Mezirow, 2000, pp. 7-8).

Transformative learning is triggered by a disorienting dilemma that leads to critical self-reflection, discourse with others, and then to a perspective transformation which the individual acts upon. Critical self-reflection is an assessment of one's assumptions, beliefs, values, mode of questioning, and meaning perspectives. Meaning perspectives are our frames of reference or the lens through which we filter, engage, and interpret the world (Merriam & Caffarella, 1999). Discourse is dialogue focused on searching for a common understanding and assessment of an interpretation or belief, during which the individual remains open and objective (Mezirow, 2000). We transform our perspectives by:

> becoming critically aware of how and why our assumptions have come to constrain the way we perceive, understand, and feel about our world; changing these structures of habitual expectations to make possible a more inclusive, discriminating, and integrative perspective; and finally, making choices or otherwise acting upon these new understandings (Mezirow, 1991, p. 167).

The purpose of this paper is to examine the literature on the experiences of first-time managers during their transition to management through the lens of transformative learning (Mezirow, 1978, 1991, 1997, 2000) and the implications for human resource development practitioners. A review of the literature was conducted using databases with a repertoire of publications on management and learning, such as Proquest, ERIC, and Wilson Web. Personal and library books were also used. Search terms included “first-time managers”, “new managers”, “promotion to management”, “transition to management”, “transformative learning”, and “human resource development”. The review of the literature was guided by the following questions: (a) How do first-time managers experience the transition to management? (b) How can HRD practitioners assist first-time managers in making a more successful transition to management?

The Transition to Management Experiences

Management is “the process of communicating, coordinating, and accomplishing action in the pursuit of organizational objectives while managing relationships with stakeholders, technologies, and other artifacts, both within as well as between organizations” (Clegg, Kornberger, & Pitsis, 2005, p. 500). The term *management* is also used to refer to the person or group of persons (or managers) who perform the functions of management. Managers perform the functions of planning, organizing, leading, staffing, budgeting, controlling, and reporting. A promotion to management involves increases in responsibilities, benefits, and status. The individual promoted is no longer responsible for his or her performance only, but also for the performance of the individuals and the department being managed. The promotion to management may include responsibility for employees’ job satisfaction, customers’ satisfaction, and the financial performance of the organization. The promotion to management may also require relocation to another office, building, or organization.

In following 19 managers through their first year, Hill (2003) found that initially they had grave misconceptions about what it meant to be a manager. When asked to describe what it meant to be a manager, most of the first-time managers began by discussing management’s rights and privileges, but not its duties. Their expectations were incomplete and simplistic, and generally began by stating that being a manager meant being *the boss*. These first-time managers struggled through the transition to management and transformed their perspectives. For some first-time managers however, the transition to management is a welcome challenge, but for others it is a daunting experience that begins with various dilemmas.

Dilemmas of First-time Managers

After the celebration and/or novelty of the promotion to management are over, first-time managers face the reality of the transition to management. First-time managers assume that their new position will give them more authority and autonomy, and they will no longer be burdened by the unreasonable demands of others (Hill, 2007). Instead, some face dilemmas, including (a) the realization that the job entails more responsibilities than anticipated, (b) the realization that the job requires more learning than anticipated, (c) unrealistic expectations from the boss, (d) conflicting demands from others in the organization, and (e) changes in relationships with co-workers. These dilemmas could be disorienting and lead to learning.

More responsibilities. It is only on assuming their new role that first-time managers realize the magnitude of their responsibilities. Instead of wearing one hat as an individual contributor, they now have to wear seven hats (Gaynor, 2004) changed several times a day: (a) Administration hat – organizing meetings, preparing reports, and interacting with other departments, (b) Direction hat – teaching, coaching, promoting, and innovating, (c) Leadership hat – taking the lead, (d) People hat –resolving people-related issues, (e) Action hat – doing the hands-on work, (f) High-anxiety hat – doing the challenging work, and (h) Business hat – putting it all together and working with the management team to achieve the organization’s objectives.

So much more to learn. In making the transition to management, first-time managers realize that the knowledge and skills that caused them to succeed in their previous roles are inadequate for success in this new role. No amount of academic preparation and observation can adequately prepare someone to be a manager (Gaynor, 2004; Hill, 2007). Learning to manage involves experiential learning. Experiential learning is “the process whereby knowledge is created through the transformation of experience” (Kolb, 1984, p. 38). Experiential learning can be a “tension and conflict filled process” (p. 30) for first-time managers as they make mistakes during the learning process.

Unrealistic expectations. Besides having to learn much more than anticipated, first-time managers are required to learn faster than anticipated. While it typically takes new managers six to eighteen months to learn all of the parts of their new role (Miller, 2006), many first-time managers are expected to do so immediately. First-time managers are also expected to be fully in charge from day one (Ameson, 2005). However, taking charge takes time. Taking charge refers to “the process of learning and taking action that a manager goes through until he (or she) has mastered a new assignment in sufficient depth to be running the organization [or department] as well as resources and constraints allow” (Gabarro, 2007, p.106). Having studied 14 management successions, Gabarro (2007) found that the taking-charge process occurs in five stages: (a) taking hold, (b) immersion, (c) reshaping, (d) consolidating, and (e) refinement. The duration of each stage varies and has its own tasks, problems, and dilemmas.

Conflicting demands. One of the first things new managers discover is that their role is more demanding than they had anticipated (Hill, 2007). Being an individual contributor requires communicating with and meeting the demands of a manager, unless the employee is in a customer-facing position and has to deal with customers. Becoming a manager however, involves communicating up, down, across, within, and outside of the organization, and meeting the demands of many stakeholders. The demands of these stakeholders can be conflicting in terms of the requests being made and the timeframes required for completion. In a study of 35 first-time managers, Pearce (1982) found that excessive time pressure was the most frequent challenge first-time managers had to overcome.

Changes in relationships. In asserting themselves in their new role, the relationships first-time managers have with various stakeholders in the organization change. Pearce (1982) also found that 87% of the first-time managers he studied experienced problems with their subordinates, and 66% encountered problems with superiors. The most challenging change is the relationship with former peers since some may be jealous or resentful (Straub, 1999). Former peers fall into four categories: (a) leavers who quit for various reasons, (b) testers who challenge first-time managers, (c) passive resisters who test the patience of first-time managers, and (d) boosters who support first-time managers (Wallington, 2005). Additionally, establishing themselves as the youngest or newest members of the management team may be a challenge for first-time managers especially those who have the huge job of replacing top-performing managers who were either promoted or left the organization (Miller, 2006).

First-time managers respond to the dilemmas they experience in various ways, including with fear, stress, and anxiety. Initially, most new managers are "afraid to do anything for fear of upsetting the apple cart" (Gabarro, 2007, p. 108). As they become familiar with their new responsibilities, and perform their managerial functions, they may experience stress and anxiety. Stress is the non-specific response of the body to any demand placed upon it (Seyle, 1974). Stress may be good and pleasant (eustress), or it may be detrimental (distress). While eustress can lead to managerial success, distress can lead to failure.

Reasons First-time Managers Fail

While the President of the United States gets 100 days to prove himself, first-time managers get 90 days (Watkins, 2003). The actions first-time managers take during their first three months determine their success or failure. First-time managers fail by getting a poor appraisal from their boss, getting fired, or voluntarily resigning from their position when they realize that they cannot meet the requirements of the job. The reasons for their failure are both organizational and personal.

Organizational reasons why first-time managers fail. Many organizations do not go through a very thorough process in promoting employees to management (Belker & Topchik, 2005). Most organizations promote individuals who they believe will become good managers based on their performance in specific fields (Ayres-Williams, 1992). However, the best performers do not always become good managers. Being an individual contributor and being a manager require different skills. Lack of basic management skills, such as the ability to manage people, leads to the failure of first-time managers. Organizations are responsible for the failure of first-time managers when they fail to articulate clear expectations, expect immediate success, expect magic, and do not prepare the team sufficiently (Ameson, 2005). First-time managers need clear job descriptions and performance objectives in order to succeed. They also need guidance from their manager. Organizations that unduly pressure first-time managers to take full charge from the first day cause them to make mistakes. Organizations that expect first-time managers to immediately fix their faulty processes, outdated technologies, and political problems also blame first-time managers for lack of progress. Additionally, when organizations fail to adequately prepare the team, first-time managers face an uphill battle and sometimes resistance from their staff which can lead to the failure of the first-time managers.

Organizations also fail to adequately prepare first-time managers for the new role when they curtail their training and development. Although training is a vital function for all organizations (Owens, 2006), human resource development (HRD) managers often encounter difficulties in defending their training budget with chief financial officers (CFOs). HRD is systematic, planned activities aimed at providing members of the organization with opportunities to learn the necessary skills to meet the demands of their current and future jobs (Desimone, Werner, & Harris, 2002). HRD is an important strategic approach for improving the productivity, efficiency, and profitability of organizations (Gilley, Eggland, & Gilley, 2002). HRD includes training, and measuring the contribution of training is often an elusive task (Owens, 2006) since the traditional financial models of measuring return on investment do not apply (Young, 2007). The path from training to performance implies a learning curve, and employees do not always leave training with skills they can readily apply (Owens, 2006). Some CFOs however, expect obvious and/or immediate returns on the organization's investment from the training.

Personal reasons why first-time managers fail. First-time managers are prone to making mistakes. Mistakes occur because of human error, working under stressful conditions, incompetence, and poor ethical standards

(Malone, 2005). Sources of human errors include lack of attention, and decision making with inadequate information or based on systems error. Management involves making decisions with inadequate information. First-time managers may find it stressful to do so for fear of failure. First-time managers who work under stressful conditions tend to make more mistakes. The mistakes first-time manager make due to incompetence include errors about the job, in their relationships with their employees, in communicating, in handling problems, and in their management style (Knippen & Green, 1999). Errors on the job are due to the lack of appropriate knowledge, skills, and attitudes, and not fully understanding what the job entails.

In studying new managers who take charge, Gabarro (2007) found that "perhaps the single most salient difference between the successful and the failed transition was the quality of the new manager's working relationships at the end of the first year" (p. 115). At the end of the first year, three of the four managers who failed had poor working relationships with at least two of their key subordinates and at least two peers, and all four managers who failed had problems with their superiors. The underlying problem was the new managers' failure to develop a set of shared expectations with their key subordinates or their bosses. Communication is very important in management and first-time managers who are not clear about what is expected of them and what they expect from their employees will fail. Communication reveals problems and first-time managers make errors in handling problems. These errors include being defensive when mistakes are made, solving employees' problems for them, and dumping problems that could or should be solved by their department on a higher level supervisor (Knippen & Green, 1999). This reflects a poor managerial style, which results in a poor evaluation and failure. "Poor ethical standards are [also] a source for many failures and mistakes in organizations" (Malone, 2005, p. 101). Ethics refer to values and morals that the organization finds appropriate, and are concerned with the virtuousness of individuals and their motives (Northouse, 2004). Poor ethical standards include inaccuracies in reporting and accepting bribes. Failure due to poor ethical standards of first-time managers is rarely publicized. Failure as a first-time manager can mean the end of a promising career. The experience of first-time managers during their managerial career can be described as a journey that ends in different ways including failure and/or perspective transformation.

The Journey Toward Perspective Transformation

A defining condition of being human is our search for meaning (Clark, 1991; Mezirow, 1997). Our frames of reference provide the context for making meaning and are the results of ways of interpreting experience. The assumptions first-time managers make, and the expectations they have about being a manager are developed by their theoretical knowledge, the organizations where they work, acquaintances who are managers, and their personalities. Individuals who manage by walking around make management look easy which makes first-time managers believe they can easily perform a manager's job, especially when they are promoted from within.

The journey toward perspective transformation begins with a disorienting dilemma. As first-time managers experience dilemmas, such as changing their various hats and dealing with unrealistic deadlines and/or conflicting demands, their frames of reference may be challenged. Frames of reference are the foundation of values and identity and they provide a sense of stability, coherence, and community. As first-time managers' frames of reference are challenged, they may begin to question what they previously believed to be unquestionable, such as their competence, and experience crises, such as personal illnesses – they may experience disorienting dilemmas. Frames of reference are often emotionally charged and some first-time managers may experience anger, shame, frustration, and guilt as they examine themselves or engage in critical self-reflection. Critical self-reflection is essentially a rational process of seeing that previously held views no longer fit and explain a new experience, since they are too narrow and too limiting (Cranton & King, 2003). Both during and after critical reflection, first-time managers may explore other perspectives in the process of discourse with others.

First-time managers may resort to discourse to justify new perspectives or when they have reasons to question the comprehensibility, truth, appropriateness, or authenticity of what is being asserted, or to question the credibility of the person making the statement. The nature of the discourse with others depends on one's psychological type (Cranton, 2006). Jung (1971) classified psychological types using two attitudes (extraversion and introversion) and four functions (thinking, feeling, sensation, and intuition) resulting in eight personality types. These are extraverted thinking, extraverted feeling, extraverted sensation, extraverted intuitive, introverted thinking, introverted feeling, introverted sensation, and introverted intuitive. First-time managers who have a preference for thinking, especially extraverted thinking, may find discourse natural, while first-time managers who are strongly introverted may find discourse to be difficult. Introverts often report that by the time they formulate their response, the dialogue has already moved on to another topic (Cranton, 2006). By engaging in discourse with others, first-time managers may realize that others understand their discontent and their process of transformation because many of them have had similar experiences. From their observation and interactions with past and current bosses and associates or peers, first-time managers acquire important competencies, values, attitudes, and instrumental and psychosocial support

(Hill, 2003). Through discourse and support from others, first-time managers may explore various options and develop and implement new action plans.

The options first-time managers explore and the action plans they develop and implement include acquiring more knowledge, developing more skills, cultivating the right attitude, and adopting a managerial identity. In organizations where budgets permit, first-time managers attend management training as part of their personal development plan. Many other first-time managers resort to self-directed learning (SDL). SDL is the process of learning whereby individuals take the initiative for planning, carrying out, and evaluating their own learning experiences (Merriam, Caffarella, & Baumgartner, 2007). First-time managers utilize the information they acquire and they develop their skills through trial and error. As first-time managers acquire more knowledge and develop more skills, they try to maintain a positive attitude especially in the presence of their subordinates. Attitudes are internal states that influence an individual's choice of actions (Gagné & Medsker, 1996), and they are expressed in thoughts, feelings, and action. Effectively balancing thoughts and emotions is critical to a successful transition to management (Betof & Harwood, 1992). The transition to management involves a change in identity for first-time managers. Identity is plural, and is reflected in the multiplicity of roles that individuals perform (Clark & Dirkx, 2000). The transition to management involves a transformation of an individual's professional and personal identity (Hill, 2003). A successful transition to management requires developing a managerial identity. First-time managers develop a managerial identity by changing their perception of themselves and their world, and by acting like managers. They move "from doer to people manager, from producer to businessperson" (p. 84). By exploring different options and developing and implementing their action plans first-time managers build competence and increase their self-confidence in their new role and transform their perspectives.

First-time managers who had misconceptions about what it means to be a manager typically transformed their perspective within their first year as a manager (Hill, 2003). First-time managers realized that management is a complex, daunting task, and an interdependent process involving shared expectation and mutual trust. They also realized that formal authority is a very limited source of power. "Perspective transformation involves (a) an empowered sense of self, (b) more critical understanding of how one's social relationship and culture have shaped one's beliefs and feelings, and (c) more functional strategies and resources for taking action" (Mezirow, 1991). Perspective transformation can lead to increased autonomy, self-determination, and responsibility (Mezirow, 1978). First-time managers who transform their perspective and reintegrate into their life on the basis of conditions dictated by their new perspective, experience transformative learning. Such first-time managers are likely to succeed whereas others are likely to fail.

Implications for Human Resource Development Practitioners

The changes in work context associated with gaining a promotion can be a transformative learning experience (Cranton, 2006; Mezirow, 1991). "Given the significance and difficulty of this first leadership test, it's surprising how little attention has been paid to the experiences of new managers and the challenges they face" (Hill, 2007, p. 50). This section explores the implications of the transformative learning experiences of first-time managers for human resource development practitioners in terms of career development, training and development, and organizational learning.

Implications for Career Development

Career development is a process requiring the creation of a partnership between employees and organizations to enhance employees' knowledge, skills, and attitudes for their current and future job assignments (Gilley et al., 2002). Traditionally a career implied promotions within an organization, increased benefits, and job security. This is no longer the case. Some managers change jobs and careers many times during their life. Of a manager's many career transitions, the transition to management for first-time managers is the most pivotal and demanding and it needs to be better understood and managed (Hill, 03) by HRD practitioners. HRD practitioners can assist first-time managers in making a successful transition to management through the use of personal development plans or learning contracts, and mentors.

Personal development plans and learning contracts. A personal development plan (PDP) is a formal document which delineates the training, development, formal and informal learning activities to be completed by an employee, with timeframes for accomplishment. Learning organizations use personal development plans to assist in ensuring that employees understand the importance of self-improvement as a basis for organizational improvement (Galbraith, Sisco, and Guglielmino, 2001). Learning organizations are:

> organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together (Senge, 1990, p.3).

A learning contract however, may be more effective since it gets the learner more involved in their learning, promotes self discipline, and is more cost effective than traditional teacher directed learning (Knowles, 1986). A learning contract is an agreement between the individual and the organization that specifies learning objectives, how they are to be accomplished, timeframes for completion, evidence of completion, and the criteria and means for evaluation (*ibid*). Given the nature of contracts, it is more binding than a personal development plan and first-time managers may be more responsive. Learning contracts can help to ensure that first-time managers acquire the necessary knowledge, skills, and attitudes prior to their transition to management.

Mentors. Mentors are experienced individuals who serve as role models and assist in the development of others. Mentors help their mentee or protégé understand organizational life and direct them through the perils and pitfalls (Gilley et al., 2002). Mentors can coach first-time managers during their transition to management and act as their confidants. First-time managers who experience disorienting dilemmas may find mentors helpful as they engage in critical reflection and discourse, explore options, and implement plans. Mentoring can be formal or informal. Formal mentoring allows organizations to build strong dyadic relationships among employees. Informal mentoring can serve as orientation to a new organization, environment, or culture.

Implications for Training and Development

To assist first-time managers in making a successful transition to management, training and development should be conducted both before and after their promotion. HRD practitioners should ensure that the organization gives priority to the training and development of first-time managers because failed transitions are costly. Training should include areas such as interpersonal skills, people management skills, negotiation, conflict resolution, leadership, team-building, and performance appraisal so that first-time managers can better handle the dilemmas they face. Development should include job rotation, doing their manager’s job for short periods while the individual is away, and performing the role of a project manager. This will enable first-time managers who have misconceptions about management to have a more realistic frame of reference.

Implications for Organizational Learning

Organizational learning is the process of inquiry whereby members of an organization develop shared values and knowledge based on the past experiences of themselves and of others (Friedman, Lipshitz, & Overmeer, 2001). Organizational learning represents “the enhanced intellectual and productive capability gained through commitment to and opportunities for continuous improvement across the organization” (Marquardt, 2002, p. 25). Organizations can learn from the experiences of first-time managers, both those who succeed and those who fail. Organizational learning can occur at two levels: (a) single loop learning, and (b) double loop learning. Single loop learning involves detecting and solving problems within the same frame of reference. Double loop learning involves thinking beyond one’s existing frame of reference to determine the underlying cause of the problem (Argyris & Schön, 1996).

Given the high failure rate for first-time managers, HRD practitioners need to learn more about the underlying cause of this problem in their organizations. Are the failures of first-time managers due to personal reasons or are they due to organizational shortcomings? Does the organization have the correct procedures for promoting, or recruiting first-time managers, and if so, are these procedures adequately adhered to? How does the organization’s culture contribute to the success or failure of first-time managers? Do first-time managers have clear job descriptions and performance objectives? HRD practitioners also need to learn how the organization can provide adequate support for its first-time managers. The needs of first-time managers vary depending on their prior knowledge, skills, and attitudes. Although there will always be some first-time managers who fail, HRD practitioners can reduce this problem by reframing or examining the transition to management from multiple perspectives or frames.

The transition to management can be examined using Bolman and Deal’s (2003) structural, human resource, political, and symbolic frames. Frames are ideas or assumptions used to analyze a problem. By using the structural frames, HRD practitioners can look at the goals, roles, and formal relationships of first-time managers. Through the human resource frame, HRD practitioners can learn about the needs, feelings, prejudices, skills, and limitations of first-time managers. The political frame allows HRD practitioners to detect and understand the conflicts that first-time managers encounter. Through the symbolic frame, HRD practitioners can assess how first-time managers adapt to the culture of the organization. By using these four frames, HRD practitioners can learn about the underlying causes of the problem so that the organization can take remedial action. Organizational learning is a critical issue for HRD, since it is important for the survival and growth of organizations (Callahan, 2003). HRD practitioners play a crucial role in ensuring that first-time managers make a successful transition to management.

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