Differences between people managers and
technical leads in managing
their former peers

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Abstract

This paper documents research on differences between two types of managers that manage their former peer groups. The two management types are people managers and technical leads. Differences were researched in three areas: communication, social interaction, and work management. All 2,100+ members of the Rocky Mountain Chapter of the Program Management Institute (PMI) were invited to complete the survey, as were a subset of Lockheed Martin people managers and technical leads. Forty-two surveys were completed. Of these, thirty-seven were from persons who managed former peers. Due to this low response, limited analysis was carried out on the thirty-seven usable responses. The key findings for persons responding to the survey were: (1), technical leads communicate with the groups they manage more frequently than their people manager counterparts, (2) people managers are more socially involved compared with their technical lead counterparts, and (3) people managers manage their workloads more efficiently compared to their technical lead counterparts

Dedication

I dedicate this report to my wonderful and beautiful family. My wife Tracy, who provided me endless support in the pursuit of my education, and who's unconditional love got me through school, and my children Rachel and Veronica who picked me up when I was down with their unconditional love for me.

I also wish to dedicate this report to my parents Nick and Paula who first inspired my intellectual curiosity. My Uncle Rolf who gave me confidence to pursue a higher education, and Ms. Carolyn Bruck who made "learning" so much fun for me at an early age.

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Introduction

There is a small body of literature and research on the management of former peers. People managers typically have responsibility for employee performance, attendance, company compliance and the like. Technical leads manage people to achieve the completion of technical tasks.

This research is a look into differences between people managers and technical leads who manage their former peers.   Acceptance of any leader by their subordinate group is a key element of success in any organization.   Moreover, acceptance of a new manager by a former peer group is often challenging to obtain for a new manager.

The purpose of this research is to help the trainers and selectors of new people managers and technical leads ensure their new management candidates are adequately trained and prepared to take on new roles as managers of former peers, as opposed to leaving such selections up to the often shallow process that many companies use, namely selecting the person that "comes across" the best. Often a person will get along great with their peer group when working side by side, but when one of the peers becomes a manager based on their interviewing skills, group productivity may suffer. Wolf (2002) writes:

> A good interviewer selects the best employee. Many times a job doesn't go to who IS most qualified; it goes to the candidate who APPEARS to be most qualified. Some extremely qualified people are very talented at their jobs. When it comes to a job interview, however, they are extremely poor performers.

This suggests that selectors should gather more in-depth information when making new management selections. The author believes that communication, social interaction, and work management are three critical dimensions selectors should examine prior to selecting new managers who will manage their former peers. This is often a delicate balancing act and many managers struggle with this aspect of their new role upon becoming a new manager. Lloyd (2002) points out that it takes time for the new manager to strike the right balance between being too tough or not tough enough. Lloyd (2002) goes on to say:

> Sometimes managers use a heavy hand when a light touch will do. "I'm the boss now and what I say goes," they seem to imply. Often, they are masking insecurity about their ability to lead by over exerting their power. Heavy-handed managers are usually secretly afraid that no one will do what they ask unless they demand obedience and threaten punishment.

When the new manager is managing their former peer group, the task of acceptance becomes that much more difficult. Krantz (1995) refers to the manager-subordinate pair as "the managerial couple". It's a relationship of great cooperation as well as great conflict. The following quote from the Impact Factory website (2003) on the managing of former peers captures part of the difficulty with the newly developed "managerial couple", "Being promoted from within a team and then being expected to manage former colleagues can be a tough challenge".

These conflicts seem to occur in both technical and non-technical fields. For example, Gardner and Gander (1992) point out that a major obstacle for the new nursing manager is distancing themselves from their former peer group. Gardner and

Gander (1992) go on to say, " The tendency is to try and maintain the relationship in

exactly the same manner as previously." This relationship change is often scary for

both the new manager and former peers, and can often result in communication issues

and other tensions if not acknowledge and confronted. Ghitelman (1998) believes it

is best to confront the situation as opposed to letting it fester: "If there's a feeling of

tension in the air it's probably best to get it out in the open and deal with it rather than

letting it fester into a future revolt or clash." Ghitelman (1998) also agrees there are

challenges with evolving social activities between a new manger and his/her former

peers. For example, the new manager may not be comfortable participating in social

activities since the relationship has changed from a peer-peer relationship to a

superior-subordinate relationship.

Two-way communication in this environment is extremely important. If the

new manager is overwhelmed with the difficulties of managing former peers, they

must be able to confront their fears, and communicate with their new group. Both

group and individual communication are an absolute necessity whether one is a

people manager or a technical lead.

The transition to management also requires a great deal of balance and

flexibility as indicated by Perets (2002):

> You're not going to be able to please everyone.
> You can either kill yourself trying or concentrate on
> managing the majority effectively. Guess which
> choice is the best use of your time? Answer that
> correctly, and you're already on the way to
> succeeding as a manager.

Although most research shows that a relationship between a new manger and

former peer can survive with changes on both sides, some research indicates it is an

"either-or" proposition as indicated in this quote by S. Brown (1990): "So often, managers want to be the employees' buddy after hours, then come into the office and manage them tomorrow. The employees simply will not allow it. It is an either-or situation"

This research looks at the dimensions of communication, social interaction, and work management for people managers and technical leads who manage their former peers. The research specifically addresses the dimensional differences between these two management types.

Background

There are many facets of working and non-working relationship dynamics when a manager is managing their former peers in the technical workplace. The author was interested in learning more about such dynamics for two different groups of managers, people managers and technical leads.   Most of the current literature on this subject suggests that communication problems are the "over-arching" hurdles to overcome. In fact, anticipated communication "blockage" and relationship disruption is such a huge issue for some potential new managers, that they refuse the promotion to management. According to Brown (2003), "Several of the experts pointed out that some people simply choose to turn down promotions because they didn't want to disrupt their relationships at work".   Brown (2003) and Joyce (2000) also point out that in many cases, the newly promoted manager will "apologize" to their new group. Brown (2003) goes on to say that this is a bad tactic, as it takes away from the new manager's credibility and ability to effectively manage.   In contrast, other new managers give the new management job a try, but quit soon after for similar reasons.

Wayman and Baber (2001) and Brown (2003) suggest that such communication hurdles can be overcome by upfront, open, and honest communication. Joyce (2002) believes that the former peer group wants to be managed by someone they know and respect: "Most of the guys, I hope, respected me when I was their peer. And I think they'd rather have someone they know in there, someone that knows their job and the requirements of the job."

Often people go from one extreme to another following their promotion into management because they think they need to rule with an "iron fist" without regards to their relationships with their former peers. Sometimes people go from nice to nasty or vice versa because they don't realize there is a middle ground (Impact Factory website, 2003).

Based on the author's sixteen years of experience in both people management and technical leadership, communication, social interaction, and work management are three essential dimensions that require mastery for the new manager in managing their former peer group. A discussion of these three dimensions follows.

Communication

Communication is a cornerstone of any healthy relationship. This is no different for the person who manages their former peers.

Although open and honest communication is a critical component to surviving the transition from "peer" to "peer manager", the transition should be more gradual as opposed to immediate (Impact Factory website, 2003), "As with any change, people will naturally require a period of leveling out, and that's usually accomplished by

some obvious leadership and honesty upfront".

This applies to both the group as well as to the individual. Pittman (1991) suggests that identification of a preferred communication style is critical to open and honest communication: "By trying to match the preferred style of the person with whom you are meeting, you can be more effective and increase mutual trust". Levin, Whitener, and Cross (2004) propose different styles based on different expectations throughout the manager-subordinate relationship. Mayer, Davis, and Schoorman (1995) define trust at a global level as "a willingness to be vulnerable based on positive expectations of others." Thus, both parties need to see the benefit of their existence with one and other before mutual trust can exits. Brown (2003) suggests the new manager set the tone so both the manager and the subordinates are on the same page from the start. Joyce (2000) also suggests that upfront communication is the way to survive a transition from peer to a manager of former peers, as does Frey (1996) who states, "Newly promoted people can alleviate the difficulties of managing their former peers by openly communicating the awkwardness of the situation, allowing the employees more opportunity in their work, getting the superior's approval on strategies, and not revealing too much about management".

Mollica (2005) suggests that an "open-door" policy helps ensure a more open dialogue between the employee and manager, and is quick to point out that both parties would be best served if the communication were a "dialogue" vice a "dumping ground". Deal (1998) points out that a traditional "open-door" policy ensured access to one's immediate manager, but in more recent times the policy is intended to provide access to upper management.

Although most research shows an open-door policy to be positive, some research indicates that it reduces productivity due to the lack of structure of the meeting (Entrepreneur Business Center, 1999).

Despite the potential drawbacks of an open-door policy, most research shows it in a positive light. Moreover, research has shown that an open-door policy is one way of achieving an overall goal of mutual trust between a superior and subordinate, which is key to a successful superior-subordinate relationship. Dirks & Ferrin (2001) believe trust to be a key ingredient to any functioning organization. Indeed, many historical and contemporary organizational scholars believe this too be true as well (Argyris, 1962; Likert, 1967; McGregor, 1967). More recently, Kramer (1999) believes that trust provides a number of benefits for organizations. Beck (1985) notes that inclusive communication helps to validate to the subordinate that their communication is important. This is in contrast to a "do it or else" communication posture. A "do it or else" communication style is often a very destructive style because it quickly eliminates the possibility of open, two-way communication.

<center>Social Interaction</center>

The transition from that of a peer to a manager of former peers is one of the most difficult career choices a person will make. Such a decision merits careful consideration. Once the decision to go forward is made, there are certain components of group dynamics that enable a person to succeed or fail depending on how well the components are executed.   Joyce (2000) highlights some of the dynamics associated with the social interaction dimension of former peer management, "How does one go from "let's have a beer" to "your appraisal for the year is". Or for technical leads,

how does one go from "lets go out to dinner" to "why are you late delivering the critical component we need for project success?" For either type of manager, one can see that the transition is not an easy one".

Building Interpersonal skills is also a very important aspect for the manager who is managing their former peers. Ward (1991) suggests that the new manager needs to develop stronger interpersonal skills compared to that of an individual contributor. These interpersonal skills help the new manager to build both a relationship with each individual and a relationship with the group as a whole. This "social" dimension allows the new manager to successfully bridge his/her former "peer to peer" relationship to a "superior to subordinate" relationship. Some research indicates that this is more difficult for a technical leader to accomplish than for a people manager. For instance, Ward (1991) cites, "Interpersonal skills can be the most difficult to master. Few engineers who make the transition to manager have trouble with the technical side of the job. But it's a real challenge to learn the human side". The basis for any relationship is trust. A working relationship is no different.

<div align="center">Work Management</div>

Work management is also a critical dimension for the new manager. Going from an individual contributor to a manager implies responsibility for many projects and/or persons. Ward (1991) suggests that juggling a multitude of projects and people is often very difficult for the newly appointed people manager or technical lead.   A new manger must rely on their team to complete tasks. The new manager does not have the time to complete all tasks on his/her own time.   Ward (1991) goes

on to say that the new manager must learn then to balance employee capabilities in

relation to the tasks at hand. This balancing act helps to ensure that subordinates

continually maintain an adequate workload. Although some amount of turnover is

normal and expected, too much turnover might indicate a problem with the manager.

(Sullivan (1998) suggests that a 10% or above turnover rate could be defined as too

much turnover. Other indicators of effective work management include a manager's

ability to complete projects on time and within budget.

 To summarize, there are many dimensions a new manager must master to

successfully make the transition from "peer" to "peer manager". It is suggested that

communication, social interaction, and work management are three of the critical

dimensions in the management of former peers.

Methodology

 The author believed a survey was the best method for obtaining information

on the communication, social interaction, and work management differences between

a people manager and technical lead. The author identified the framework for

measurement which resulted in analyzing the three dimensions of communication,

social interaction, and work management. This framework was based on the

available research and literature as well as the author's sixteen years of experience in

the work place. Once the framework and dimensions were identified, it was

determined that a questionnaire from a pool of people managers and technical leads

would be the most efficient way of measuring the communication, social interaction,

and work management differences between the two manager types.

Since a true random sample was not possible for this survey, the author used convenience sampling to obtain a sample frame. Convenience sampling is the process of sampling an available population non-randomly through methods such as "word of mouth" and other similar types of communication.

Table 1 shows the measures that were collected for each dimension.

Table 1: Dimensions and Measurements

DIMENSION	MEASUREMENT
Communication	Amount of manager and group communication
	Amount of manager and individual communication
	Manager's communication style - open-door
	Manager's communication style - appointment required?
Social Interaction	Manager's perception of acceptance by the subordinate group
	Manager's perception of respect by the subordinate group
	Degree of manager inclusion in non-work related activities by subordinate group
	Manager comfort with non-work Communication with group
	Manager comfort with work Communication with group
Work Management	Project completion rate by manager
	Subordinate turnover rate in manager's group

Survey design

The survey tool collected information on the three dimensions from the target audience of PMI website users and Lockheed Martin people managers and technical leads (Appendix A). The Survey was administered via the Zoomerang Survey Product[1]. The survey results were analyzed using the JMP statistical package[2] .

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[1] Zoomerang is created by MarketTools, Inc., Mill Valley, CA
[2] JMP Start Statistics, SAS Institute Inc., 2005

Survey takers accessed the survey link at the PMI website and were connected directly to the Zoomerang website to complete the survey. Zoomerang also kept track of all statistical information associated with the survey.

An initial survey draft was pilot tested by a group of 15 persons. Table 2 shows the makeup of the Pilot Test Team:

Table 2: Survey Pilot Test Team

Eleven Lockheed Martin Tech Leads and People Managers
Two University Professors
One High-Tech Manager (Seagate Corp.)
One Federal Express Manager

Analysis of survey results

The survey was active from 3/22/05 through 3/29/05. During this time period there were a total of fifty-five visits to the survey site, and a total of forty-two surveys completed. Of these forty-two completed surveys, thirty-seven were from people who managed their former peer group, while five were from people who had managed a group, who were not comprised of former peers. Only the thirty-seven persons who managed their former peers are included in this analysis. As Table 3 illustrates, the most frequent respondent was a male, aged 31 – 60, a technical lead from a non-union, white collar, high-tech setting, and working for a for-profit organization.

Table 3: Profile of usable survey respondents

NUMBER OF RESPONDENTS	37	100%
People Managers	11/37	30%
Technical Lead	26/37	70%
Gender Breakdown		
People Managers		
Female	4/11	36%
Male	7/11	64%
Technical Lead		
Female	5/26	19%
Male	21/26	81%
Respondent Age Breakdown		
People Managers		
22-30	1/11	10%
31-40	2/11	18%
41-50	3/11	27%
51-60	3/11	27%
greater than 60	2/11	18%
Technical Lead		
22-30	2/26	7%
31-40	9/26	35%
41-50	7/26	27%
51-60	7/26	27%
greater than 60	1/26	4%
Facility Type		
People Manager		
Non Union - White Collar	11/11	100%
Technical Lead		
Non Union - White Collar	23/26	88%
Union Shop - Blue Collar	1/26	4%
Non-Union - Blue Collar	2/26	8%
Industry Breakdown		
People Manager		
Government (Federal, State, or Local)	1/11	9%
For Profit (High Tech/Aerospace)	10/11	91%
Technical Lead		
Government (Federal, State, or Local)	5/26	19%
For Profit (High Tech/Aerospace)	21/26	81%

Communication Dimension analysis

The communication dimension addresses how well each manager type communicates with their group. The components for this dimension are individual communication, group communication, open-door policy, and appointment required policy.

Analysis of Group Communication

As Table 4 shows, the technical leads who responded to this survey had 15% more daily communication than the people managers, while the people managers had 5% more communication with their group on a weekly basis. Figure 1 illustrates that the technical leads communicated more often than their people manager counterparts. For example, looking at the daily and weekly communication levels together, the technical lead group had 9% more communication with their group than their people manager counterparts (73% versus 64%). When bi-weekly communication is added, the technical lead extends their communication dominance over the people manager by over 16% (88 % versus 73%).

Table 4: Group Communication results

Group Communication	Daily	Weekly	bi-weekly	monthly	none
People Manager	27%	36%	9%	18%	9%
Technical Lead	42%	31%	15%	8%	4%
Difference	-15%	5%	-6%	10%	5%
	Daily	Weekly	bi-weekly	monthly	none
People Manager Total - CUM	27%	64%	73%	91%	100%
Technical Lead Total - CUM	42%	73%	88%	96%	100%
Difference CUM	-15%	-9%	-15%	-5%	0%

Figure 1: Cumulative frequency of group communication responses

frequency of group communication	Daily	Weekly	bi-weekly	monthly	none
People Manager Total - CUM	27%	64%	73%	91%	100%
Technical Lead Total - CUM	42%	73%	88%	96%	100%
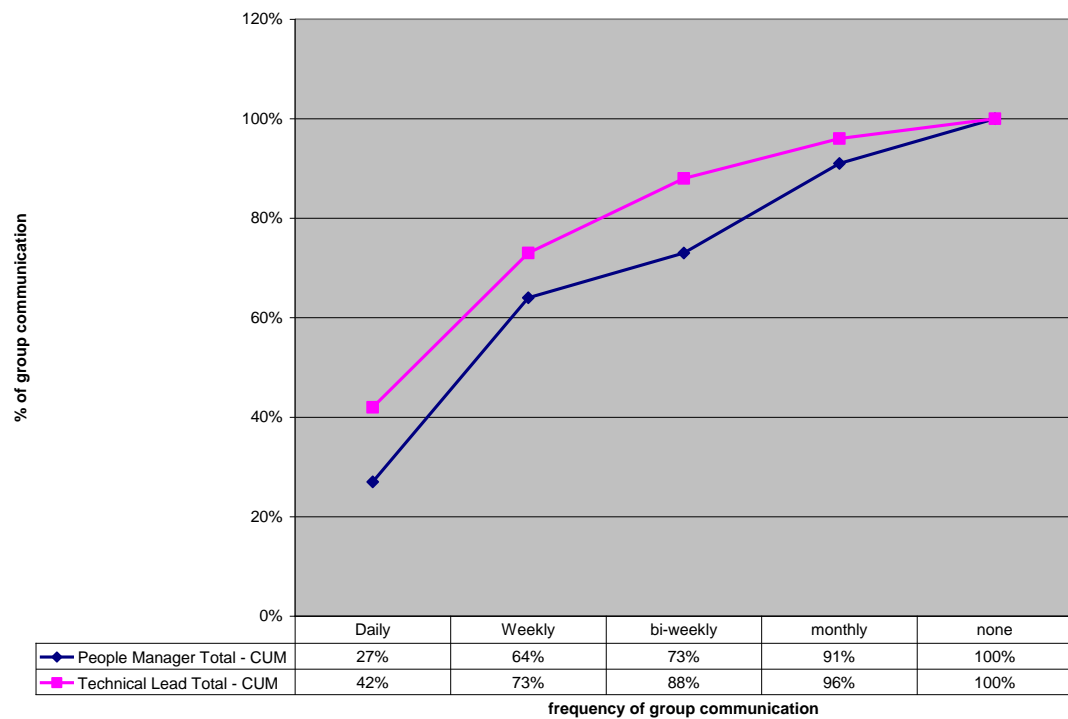
Analysis of Individual Communication

Table 5 reveals that the technical leads in this study had a substantially higher individual communication rate compared to the people managers. Figure 2 shows the cumulative communication for technical leads was higher than people managers across all time spans.

Table 5: Individual communication results

Individual Communication					
	Daily	Weekly	bi-weekly	monthly	none
People Manager	27%	9%	9%	45%	10%
Technical Lead	42%	23%	19%	12%	4%
Difference	-15%	-14%	-10%	33%	6%
	Daily	Weekly	bi-weekly	monthly	none
People Manager - CUM	27%	36%	45%	91%	100%
Technical Lead - CUM	42%	65%	85%	96%	100%
Difference - CUM	-15%	-29%	-40%	-5%	0%

Figure 2: Cumulative frequency of individual communication responses

	Daily	Weekly	Bi-weekly	Monthly	None
People Manager - CUM	27%	36%	45%	91%	100%
Technical Lead - CUM	42%	65%	85%	96%	100%

frequency of individual communication
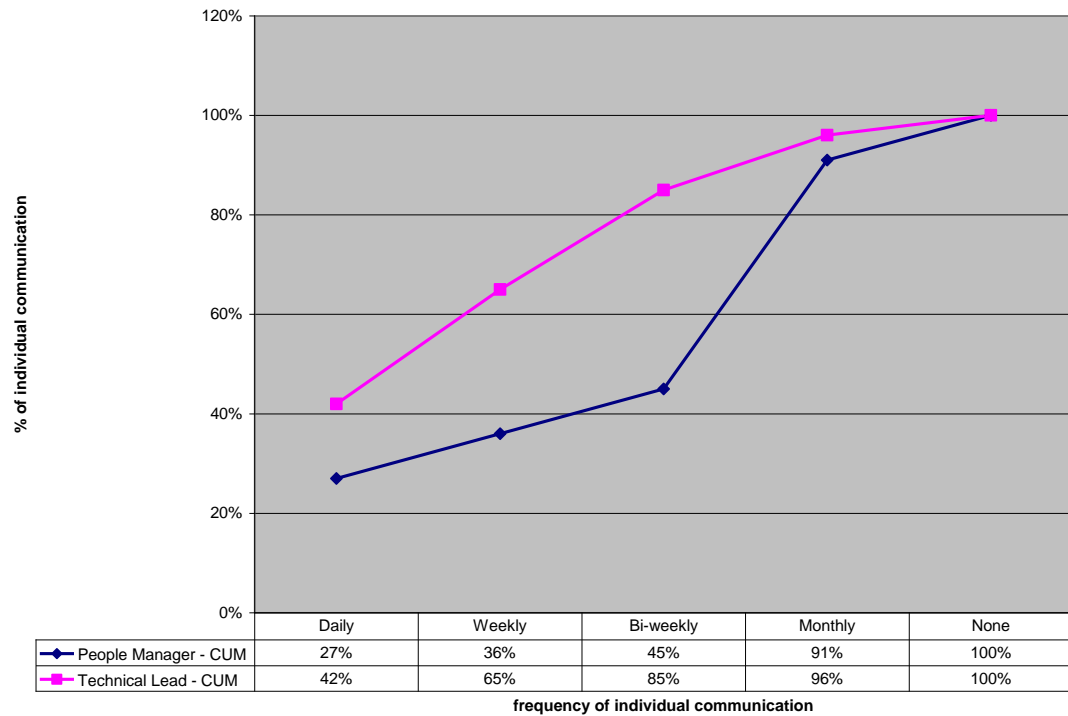
Analysis of Open-Door Policy

As Table 6 indicates, 100% of the people managers either "agree" or "strongly agree" that they have an open door policy. The technical leads show an 85% rate for the same "agree – strongly agree" categories. Figure 3 clearly shows that the people manager group had more of an open-door policy compared to their technical lead counterparts.

Table 6: Open Door policy

"Open Door" policy					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager	73%	27%	0%	0%	0%
Technical Lead	65%	19%	4%	0%	12%
Difference - Frequency	8%	8%	4%	0%	-12%
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager Total – CUM	73%	100%	100%	100%	100%
Technical Lead Total - CUM	65%	85%	88%	88%	100%
Difference – CUM	8%	15%	12%	12%	0%

Figure 3: Cumulative frequency of "open door policy" responses

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager Total - CUM	73%	100%	100%	100%	100%
Technical Lead Total - CUM	65%	85%	88%	88%	100%

frequency of agreement
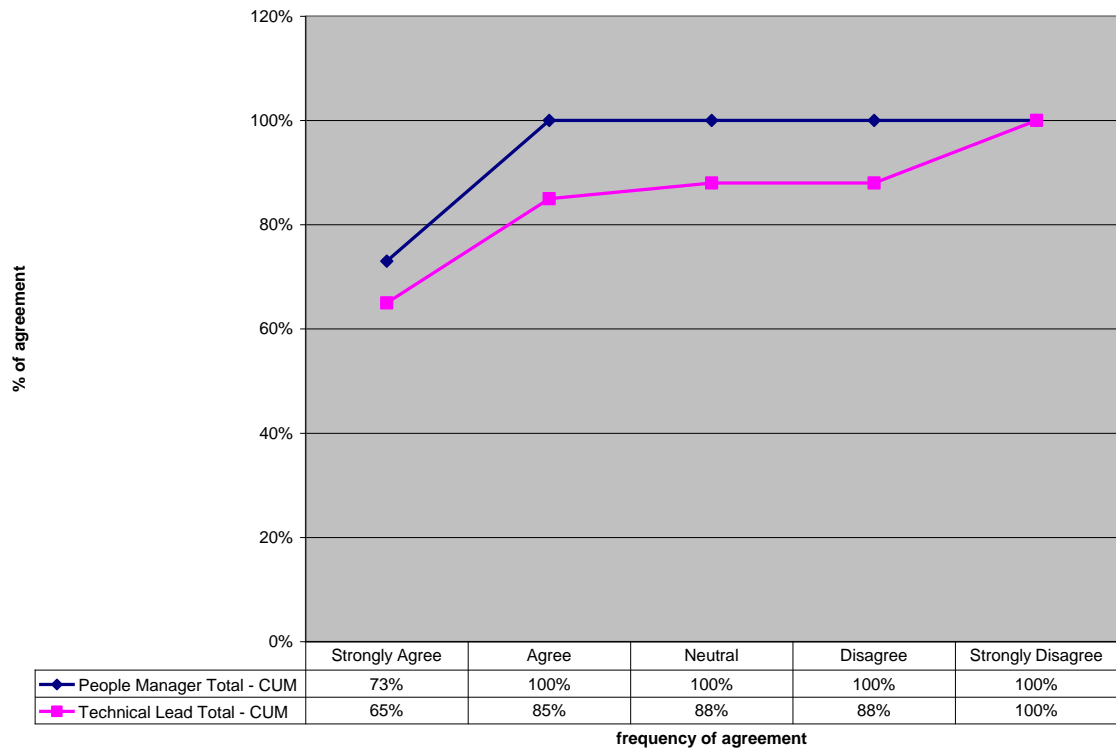
Analysis of Appointment Required

As Table 7 indicates, 55% of the people managers disagreed or strongly disagreed with the notion of requiring an appointment for one-on-one communication, while 54% of the technical leads "disagreed" or "strongly disagreed" with this notion. Although both management groups overall disagreed with the notion of an appointment, signifying more "open" and free-flowing communication there were still about 36% of people managers that required an appointment, while just 12% of technical leads levied the same requirement on their respective groups. Figure 4 shows this trend.

Table 7: Appointment required

Appointment required					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager	0%	36%	9%	55%	0%
Technical Lead	0%	12%	35%	35%	19%
Difference	25%	24%	-26%	20%	-19%
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager - CUM	0%	36%	45%	100%	100%
Technical Lead - CUM	0%	12%	46%	81%	100%
Difference - CUM	0%	24%	-1%	19%	0%

Figure 4: Cumulative frequency of appointment required responses

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager - CUM	0%	36%	45%	100%	100%
Technical Lead - CUM	0%	12%	46%	81%	100%

frequency of agreement
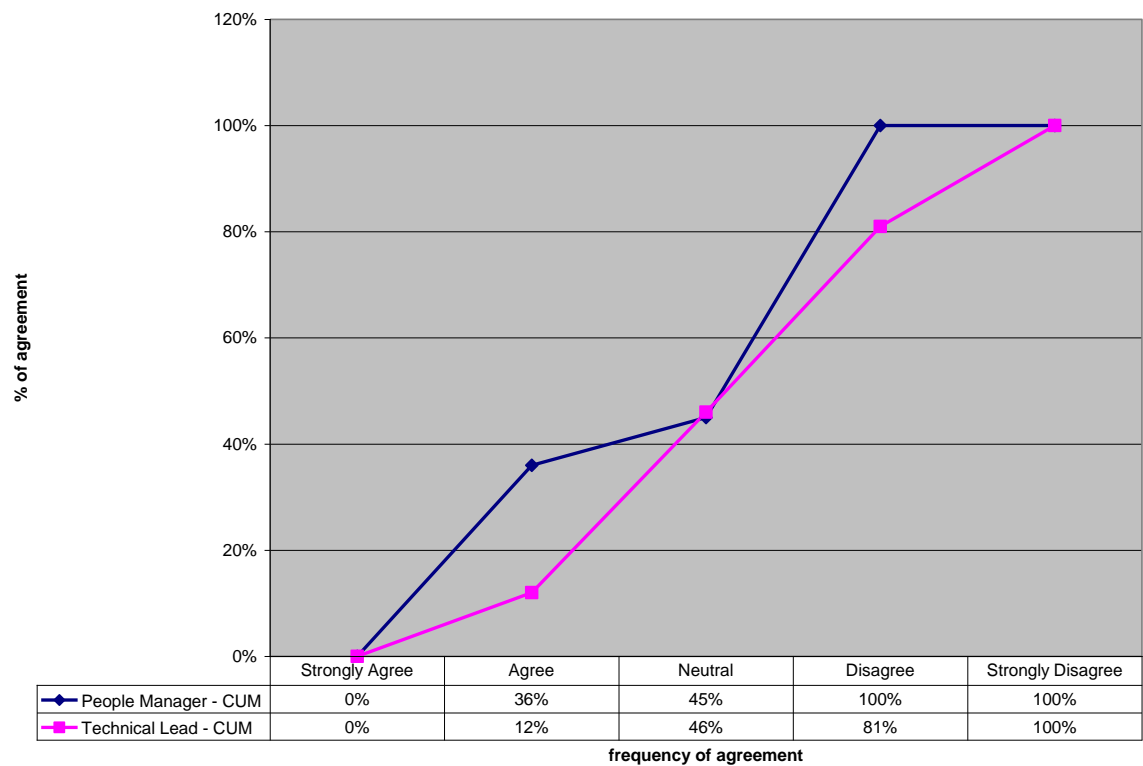
Statistical analysis scoring methodology

Following each dimension analysis section, there will be a table that

summarizes the dimension scores for each manager type. For example, Table 8

below summarizes the scoring for the communication dimension. Points are assigned

to the manager type receiving the higher response, which is seen in each of the figures

through a cumulative progression. For example, in the first example of group

communication below in Table 8, the technical lead group scored higher in all four

categories and thus received 4 points out of a possible 4 points. In the event of a tie, a

½ point is awarded to both management types. These scores will then be tallied up in

a final dimension summary table located in the "summary of dimension analysis"

section.

Summary of Communication Dimension analysis

Table 8 highlights the four areas of the communication dimension. Overall the

technical lead group report more favorable communication.

Table 8: Communication Dimension

DIMENSION ELEMENTS	PEOPLE MANAGER points	TECHNICAL LEAD Points
Group Communication	0/4	4/4
Individual Communication	0/4	4/4
Open-Door policy	4/4	0/4
Appointment Required	2.5/4	1.5/4
Point Total	**6.5/16 (41%)**	**9.5/16 (59%)**

Social Dimension analysis

The social dimension portion of the survey was designed to measure the degree to which the people managers and technical leads were accepted from a social perspective. The measurements for this dimension were group respect, group acceptance, inclusion, non-work communication, and work communication. The respect and acceptance elements were measured by obtaining the survey taker's perception of respect and acceptance that their group had for them as managers. Inclusion was measured by identifying the amount of outside (non-work related) activities the managers participated in with their respective groups. Both non-work and work related communication was measured by obtaining the amount of non-work and work related communication the survey taker engaged in with their former peers.

Analysis of Social Acceptance

As Table 9 illustrates, 100% of people managers agree or strongly agree that they are socially accepted by the groups they manage. Technical leads report an 84% group acceptance at the strongly agree and agree levels. Figure 5 shows the cumulation trend for the "social acceptance" dimension.

Table 9: Perception of group social acceptance for people manager

Manager perception of social acceptance					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager	27%	73%	100%	100%	0%
Technical Lead	27%	58%	4%	4%	7%
Difference	0%	15%	96%	96%	-8%
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager - CUM	27%	100%	100%	100%	100%
Technical Lead - CUM	27%	85%	88%	92%	100%
Difference - CUM	0%	15%	12%	8%	0%

Figure 5: Cumulative frequency of group "social acceptance" responses
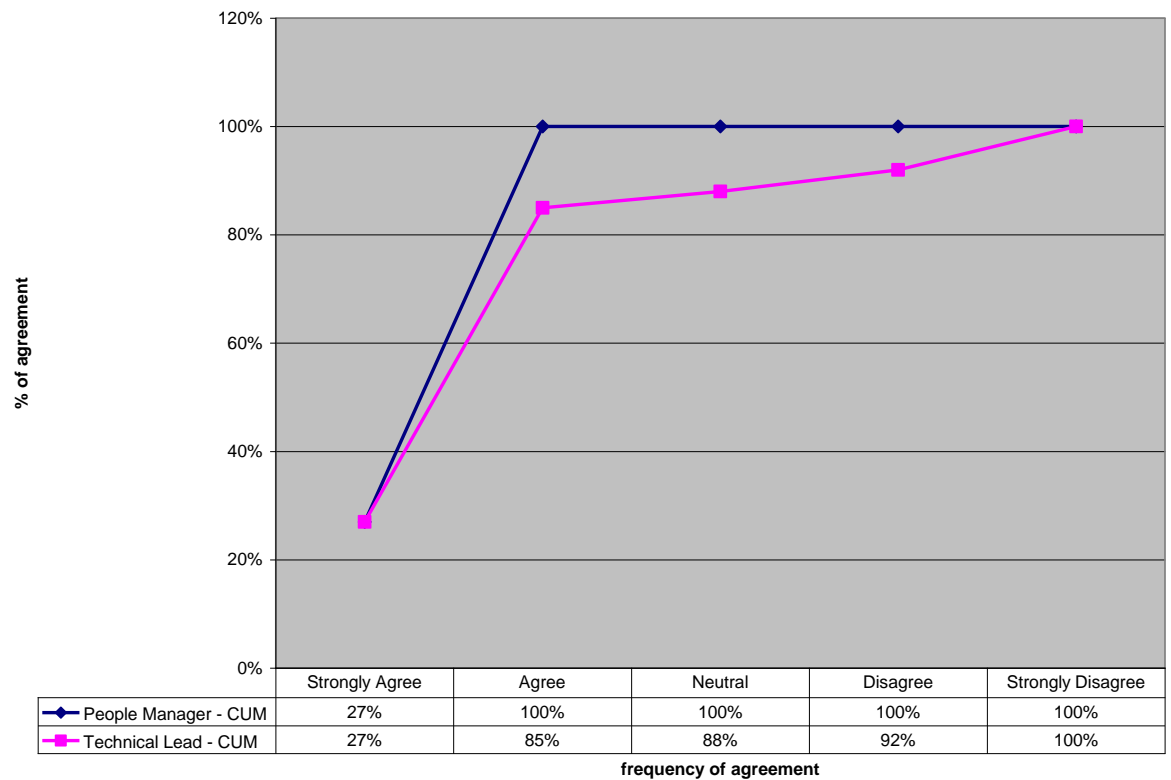
Analysis of Group Respect

From a "group respect" standpoint, Table 10 shows similar numbers to those showed for group acceptance. 91% of people manager respondents felt respected (strongly agree/agree) by their groups, while 81% of technical leads felt respected. Figure 6 shows a small contingent of technical leads strongly disagreed when it came to experiencing group respect (4%).

Table 10: Perception of group respect of manger

Manager perception of respect					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager	9%	82%	9%	0%	0%
Technical Lead	27%	54%	15%	0%	4%
Difference	-18%	28%	-6%	0%	-4%
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager	9%	91%	100%	100%	100%
Technical Lead	27%	81%	96%	96%	100%
Difference	-18%	10%	4%	4%	0%

Figure 6: Cumulative frequency of "social respect" responses

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager - CUM	9%	91%	100%	100%	100%
Technical Lead - CUM	27%	81%	96%	96%	100%

frequency of agreement
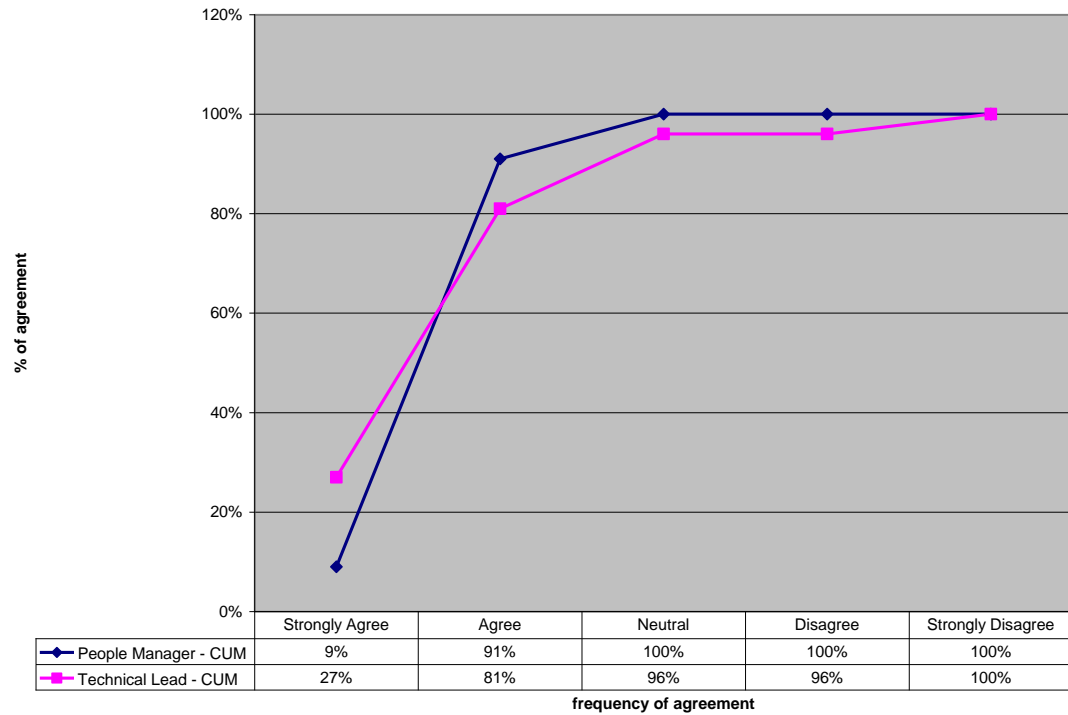
Analysis of Group Inclusion

Table 11 illustrates the breakdown for "group inclusion" (outside get-togethers, etc…). 91% of people managers reported being included in group activities more often than "rarely". This number was about 10% lower for the technical leads at 81%. Technical leads had a higher rate when looking at the two highest categories of "majority of the time" and "frequently" at 50% compared to just 27% for people managers. It is also noted that 20% of technical leads "rarely" or "never" got together outside of work with their group, compared with only 9% for the people managers. Figure 7 shows the cumulative trend for group inclusion.

Table 11: Group inclusion of manager

Group Inclusion of Manager						
	Majority of the time	Frequently	Sometimes	Rarely	Never	Row Total
People Manager	0%	27%	64%	9%	0%	100%
Technical Lead	12%	38%	31%	12%	8%	100%
Differential	-12%	-11%	33%	-3%	-8%	
	Majority of the time	Frequently	Sometimes	Rarely	Never	Row Total
People Manager	0%	27%	64%	9%	0%	100%
Technical Lead	12%	38%	30%	12%	8%	100%
Differential	-12%	-11%	34%	-3%	-8%	0%

Figure 7: Cumulative frequency of "group inclusion of Manager" responses

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Manager - CUM	0%	27%	91%	100%	100%
Technical Lead - CUM	12%	50%	81%	92%	100%

frequency of agreement
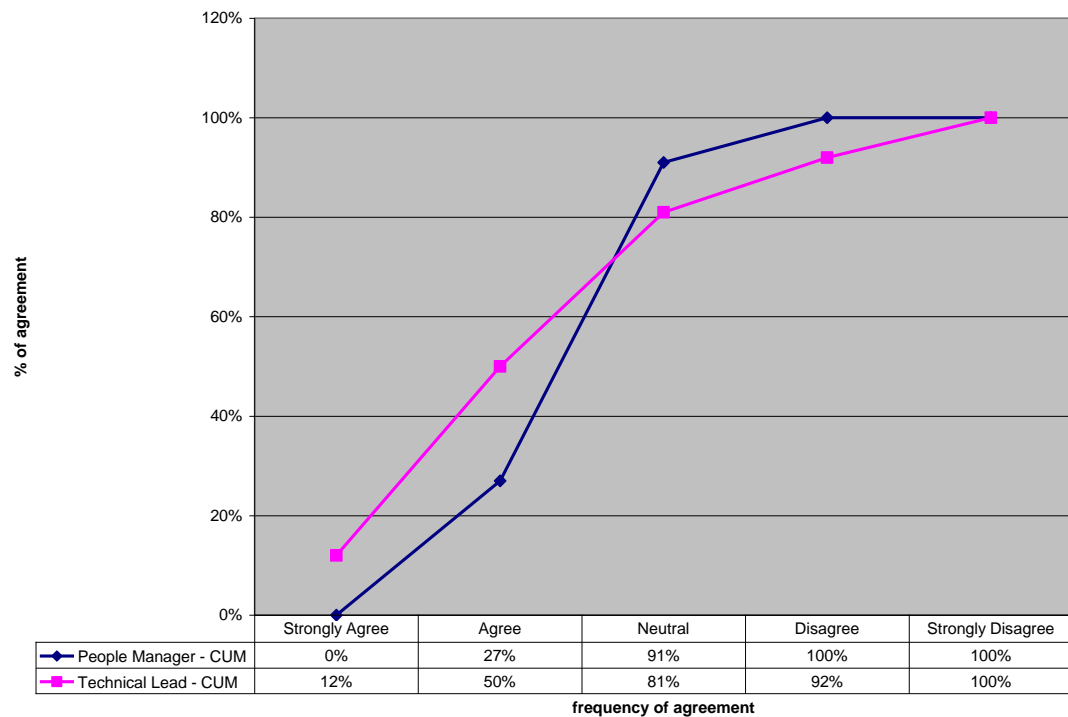
Analysis of Non-work and work related communication

Table 12 reveals that 91% of the people manager respondents felt comfortable talking about non-work related topics a majority of the time or frequently.   Technical leads were 11% lower at about 80% for the same categories.   Figure 8 shows that the people managers were more comfortable with non-work related communication across the board when compared to technical leads.

Table 13 shows the results for "work related' information. 100% of people managers felt comfortable "a majority of the time" or "frequently" compared with 84% for technical leads. Figure 9 shows the cumulative trend for this element.

Table 12: Comfort with "non-work" related communication

Comfort with non-work Communication					
	Majority of the time	Frequently	Sometimes	Rarely	Never
People Manager	27%	64%	9%	0%	0%
Technical Lead	15%	65%	19%	0%	0%
Difference	12%	-1%	-10%	0%	0%
	Majority of the time	Frequently	Sometimes	Rarely	Never
People Manager	27%	91%	100%	100%	100%
Technical Lead	15%	81%	100%	100%	100%
Difference	12%	10%	0%	0%	0%

Figure 8: Cumulative frequency of comfort with non-work related communication responses

comfort with non-work communication	Majority of the time	Frequently	Sometimes	Rarely	Never
People Manager - CUM	27%	91%	100%	100%	100%
Technical Lead - CUM	15%	81%	100%	100%	100%
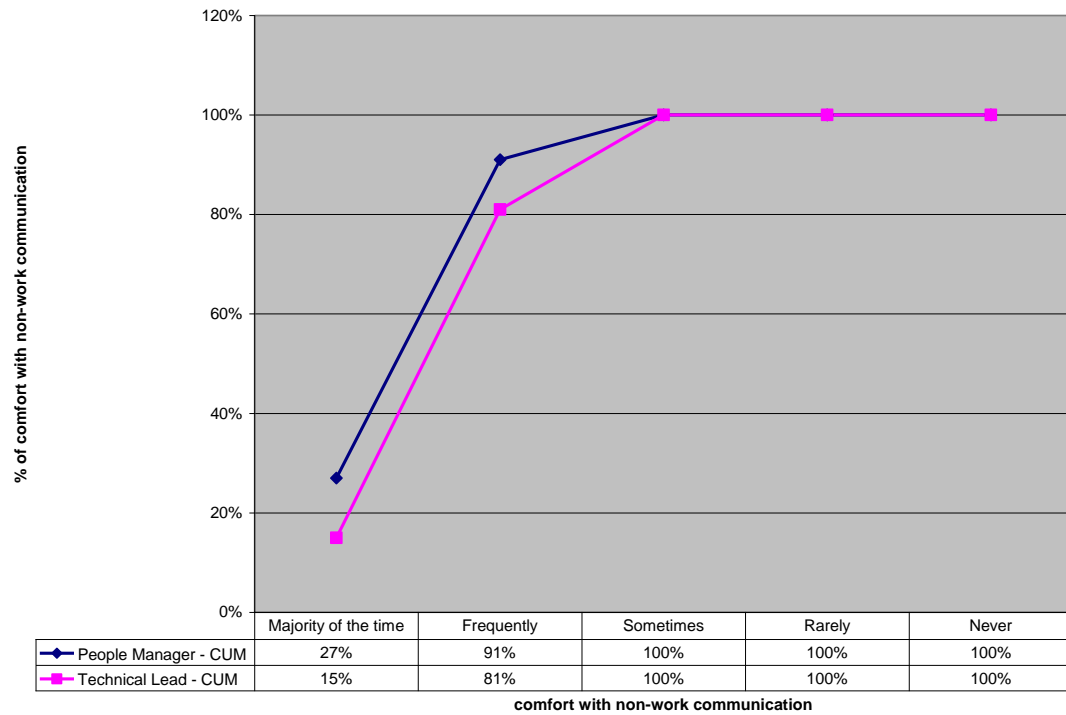
Table 13: Comfort with "work related" communication

Comfort with work communication					
	Majority of the time	Frequently	Sometimes	Rarely	Never
People Manager	36%	64%	0%	0%	0%
Technical Lead	38%	46%	12%	4%	0%
Difference	-2%	18%	-12%	-4%	0%
	Majority of the time	Frequently	Sometimes	Rarely	Never
People Manager	36%	100%	100%	100%	100%
Technical Lead	38%	85%	96%	100%	100%
Difference	-2%	15%	4%	0%	0%

Figure 9: Cumulative frequency of comfort with "work-related" communication responses

	Majority of the time	Frequently	Sometimes	Rarely	Never
People Manager - CUM	36%	100%	100%	100%	100%
Technical Lead - CUM	38%	85%	96%	100%	100%

frequency of work-related communication
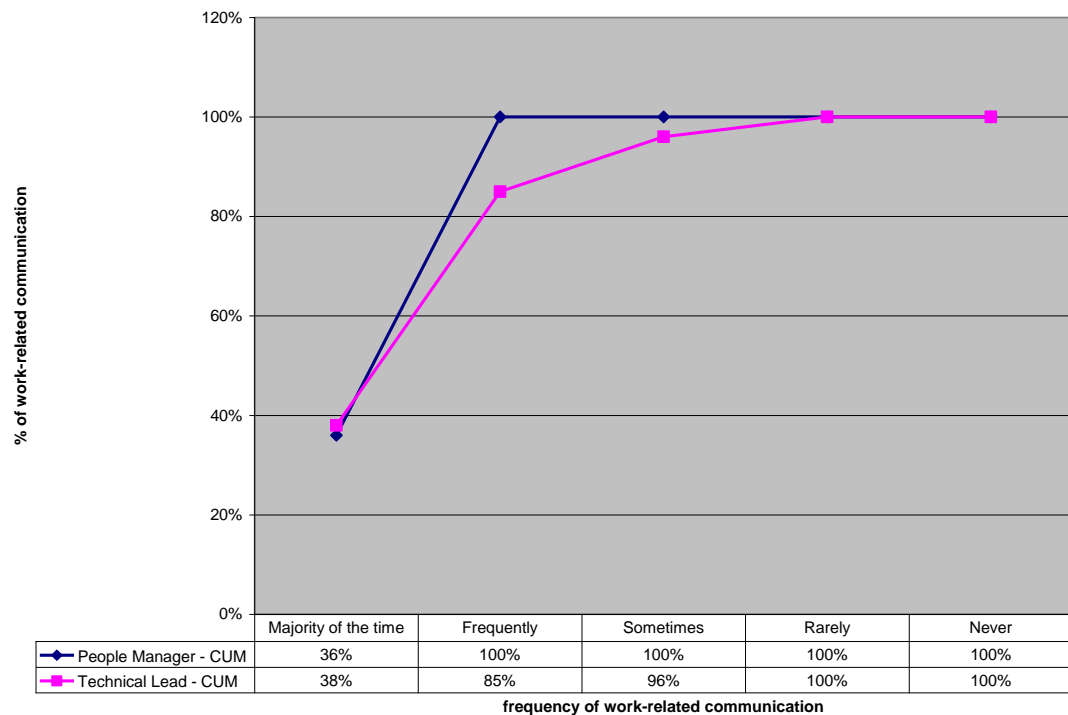
Summary of Social Dimension analysis

Table 14 illustrates that people managers generally enjoy more social interaction with their groups than their technical lead counterparts. People managers scored higher in virtually every category compared to their technical group counterpart. The one exception being inclusion, where the technical leads and people managers scored the same.

Table 14: Social Dimension Summary

DIMENSION COMPONENTS	PEOPLE MANAGER points	TECHNICAL LEAD points
Perception of Group Acceptance	3/4	1 /4
Perception of Group respect	3/4	1/4
Group inclusion of Manager	2/4	2/4
Comfort with Non-work related discussions	3/4	1/4
Comfort with work-related topics	2.5/4	1.5/4
Point Total	**13.5/20 (68%)**	**6.5/20 (32%)**

Work Management Dimension analysis

The Work Management dimension addresses how well each management group manages the work of the business. The components of this dimension are project completion rate and subordinate turnover rate.

Analysis of Project Completion Rate

Table 15 measures the job completion rate for each manager group. 100% of the people manager group completed at least 80% of the projects they started. 73% of people managers completed 90% of the projects they started compared to 81% for the technical leads. The 80% or higher completion rate for the technical leads was 96% which was slightly lower than the people manager group as seen in Figure 10.

Table 15: Project Completion Rate

Project Completion Rate				
	90% or more of projects completed	80% or more of projects completed	70% or more completed	Less than 70% of projects completed
People Manager	73%	27%	0%	0%
Technical Lead	81%	15%	0%	4%
Difference	-8%	12%	0%	-4%
	90% or more of projects completed	80% or more of projects completed	70% or more completed	Less than 70% of projects completed
People Manager - CUM	73%	100%	100%	100%
Technical Lead - CUM	81%	96%	96%	100%
Difference - CUM	-8%	4%	4%	0%

Figure 10: Cumulative frequency of "project completion rate" responses

	90% or more of projects completed	80% or more of projects completed	70% or more completed	Less than 70% of projects completed
People Manager - CUM	73%	100%	100%	100%
Technical Lead - CUM	81%	96%	96%	100%

frequency of project completion
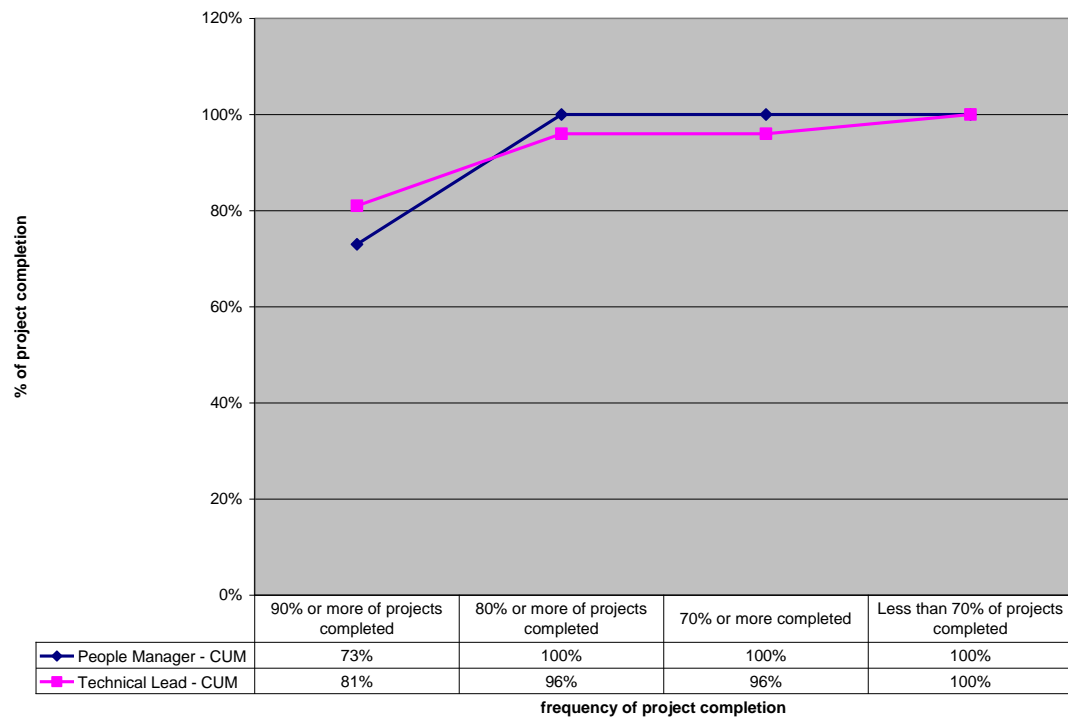
Analysis of Subordinate Turnover Rate

Table 16 illustrates the turnover rate for both groups of management. The

technical lead group had lower turnover rate in every category compared to their

people manager counterparts. It is important to note that a higher score in the

categories for this component is not desirable because it could signify a problem

within the group, thus the lower turnover the better. The one exception to this rule is

the 0% turnover category, where a higher percentage score is better. In this case, the

Technical Lead group had a much higher 0% turnover score at 27% compared to only

9% for the people manager group. In contrast, the people manager group had lower

turnover in every other category compared to their technical lead counterparts.

Therefore to more accurately measure this category, the author decided to calculate a

weighted average score for each manager.[3] The cumulative trend for subordinate

turnover is clearly illustrated in Figure 11.

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[3] Weighted average was calculated by finding the mid-point for each turnover category, then
multiplying the category result by the midpoint, then adding up the numbers to obtain a score. Below
are the calculations: People manager - .09(0) + .64(5) + .09(17) + .18(37) = 11.4%
                    Technical Lead - .27(0) + .58(5) + .04(17) + .12(37) = 8.0%
The results were then converted to a show the percentage of 4 points each management type received:
   People Manager – 11.4%/19.4% = 59% x 4 pts = 2.4 pts
                    Technical Lead -   8.0%/19.4% = 41% x 4 pts = 1.6 pts

Table 16: Subordinate Turnover Rate

Subordinate Turnover Rate					
	0% Turnover	1-10% Turnover	11-24% Turnover	25-50% Turnover	greater than 50%
People Manager	9%	64%	9%	18%	0%
Technical Lead	27%	58%	4%	12%	0%
Difference	-18%	6%	5%	6%	0%
	0% Turnover	1-10% Turnover	11-24% Turnover	25-50% Turnover	greater than 50%
People Manager	9%	73%	82%	100%	100%
Technical Lead	27%	85%	88%	100%	100%
Difference	-18%	-12%	-6%	0%	0%

Figure 11: Cumulative frequency of "subordinate turnover rate" responses

	0% Turnover	1-10% Turnover	11-24% Turnover	25-50% Turnover	greater than 50%
People Manager - CUM	9%	73%	82%	100%	100%
Technical Lead - CUM	27%	85%	88%	100%	100%

subordinate turnover rate
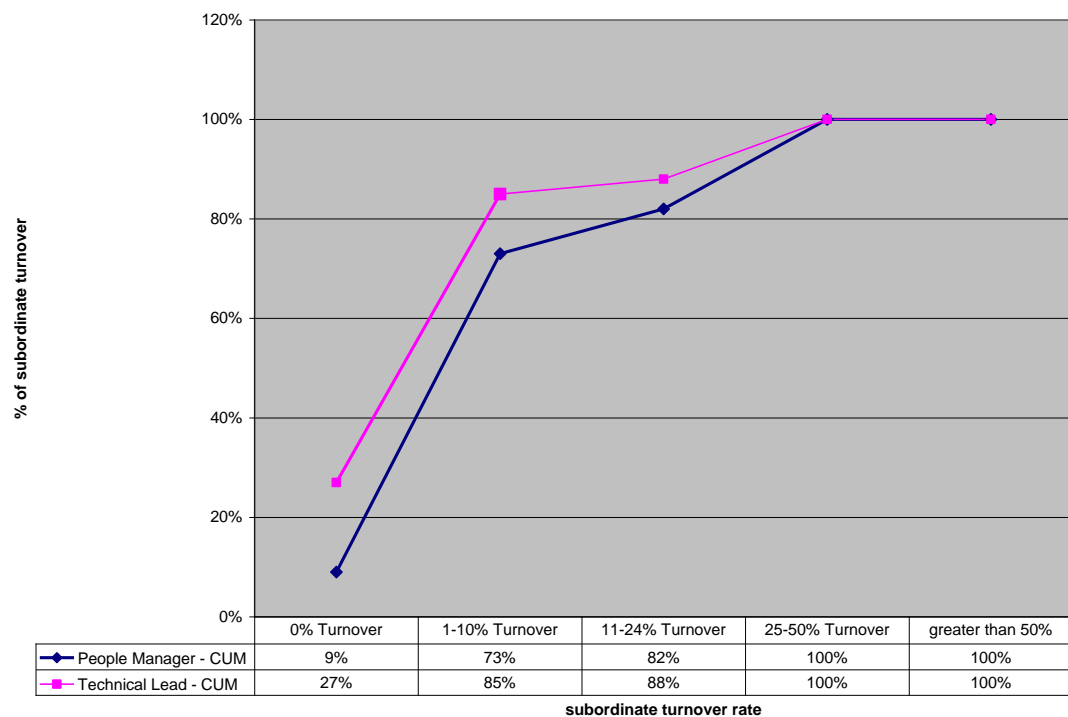
Reasons for subordinate turnover

Tables 17 and 18 show the different reasons people mangers and technical

leads gave for leaving their perspective groups. Nine percent of the technical lead

group reported that their subordinates left because they were unhappy with their work

or Manager. This is contrasted with the people manager group, who were at 0% for

these same categories. The typical reason that people left in either group was for a

better opportunity either within or outside of the company.

Table 17: Reasons for leaving (people manager)

Better Opportunity "within" Company	40%
Better Opportunity "outside" of company	20%
More Money	20%
Change of Career Direction	13%
Layoffs	7%

Table 18: Reasons for leaving (technical lead)

Better Opportunity "within" Company	26%
Better Opportunity "outside" of company	25%
More Money	22%
Change of Career Direction	6%
Layoffs	6%
Unhappy with work	6%
Unhappy with manager	3%
Reassigned	3%
Low morale	3%

Summary of Work Management Dimension analysis

The people manager group had a better project completion rate compared to the technical lead group with a 67% to 33% advantage, while the technical leads scored higher as a result of their lower turnover rate as shown in Table 19. As a result, the people manager scored slightly higher in this dimension at 51% compared to 49% for the technical leads.

Table 19: Work Management Dimension summary

COMPONENTS	PEOPLE MANAGER points	TECHNICAL LEAD points
Project Completion Rate	2/3	1/3
Subordinate Turnover Rate	1.6/4	2.4/4
Point Total	**3.6/7 (51%)**	**3.4/7 (49%)**

Summary of Dimension Analysis

Table 23 summarizes the analysis for the three dimensions addressed in this study. This analysis shows that the people managers scored higher in two out of three categories. Communication was the only area where the technical leads performed better than their people manager counterparts.

Table 23: Overall Acceptance by Dimension

DIMENSION	PEOPLE MANAGER points	TECHNICAL LEAD points
Communication	7.5/20	12.5/20
Social Interaction	16/25	9/25
Work Management	6.5/9	2.5/9
Point Total	**30/54 (56%)**	24/54 (44%)

Study Limitations

While the results of this study were interesting, there were several limiting

factors that need to be noted. First, the sample size was fairly small and the sample

frame was from a non-homogenous population. Due to the non-homogeneity of the

population, it was not possible to carry out a full breath of statistical analysis on the

survey results. Rather, the author had to take the survey results, compile statistics,

and state conclusions regarding the statistics from the sample frame of PMI web users

and Lockheed Martin people managers and technical leads. Despite this, the

framework and conclusions from this study are still very useful to have when looking

at differences between people managers and technical leads because they provide

upper management and company training coordinators a methodology in which to

gauge the preparedness of potential people manger and technical lead candidates.

Another limitation of the survey was that some of the responses required a

reliance on the survey taker's perception and memory, which potentially limited the

accuracy of the responses. For example, a manager's project completion rate cannot

be quantitatively proven because the answer is dependent on the survey taker's

perception and memory. However it is noted that the perception of the survey taker

with regards to such questions are still very important because they provide an idea as

to which manager is better prepared for managing their former peers. It is also noted

that one way to verify such perceptions would be to conduct follow-on interviews

with the survey takers to further validate their responses.

A final limitation to take note of is the fact that some survey responders

engaged in both people management and technical leadership. The author resolved

this by asking respondents to answer the survey based on their first management

assignment.   For subsequent surveys it would be beneficial to separate the folks that

performed people management, technical management, and both types of

managements. This would allow the researcher to eliminate the folks that performed

both types of management, and focus the research on those that performed people

management or technical leadership. It would also be beneficial to know the size of

the company in which the respondents managed. For example, did they manage in a

company with 20 members or 20,000 members? Survey responses might vary with

company size so this would be very beneficial information to have for analysis

purposes.

Conclusion

The managing of one's former peers demonstrates unique dynamics within the

realm of management. Former relationships are often transformed, and in many cases

eliminated all together in the new superior – subordinate relationship. There is very

little literature on the differences between a people manager and a technical lead with

regards to managing former peers. Although the survey response rate was

disappointing, there were some interesting patterns revealed for the persons who

participated in this study. First, technical leads communicated with their peer group

far better than their people manager counterparts from both an individual and group perspective. Second, people managers were far more involved with their former peer group from a social interaction perspective, which is basically outside activities not related to the work environment, and third the people manager group was slightly better at work management than their technical lead counterparts.

Despite the limitations of this study, the results will still be very beneficial to the company training coordinator and upper management team tasked with selecting that next people manager or technical lead. For example, this study shows that technical leads communicate far better with their former peers than their people manager counterparts. A training coordinator along with upper management can work together to improve the communication skills of potential people manager candidates, which in turn will add value to the enterprise through a more prepared and effective people manager. It is also noted that this type of survey should be given periodically to a company's pool of management talent so the score for the various dimensions can be identified. The scores between the two management types can and will change over time as the training for these new leaders improves. It would also be beneficial to know when one of these management groups score very low, so training programs can be refocused to address training deficiencies. This type of survey would reveal potential training deficiencies.

In summary, this study suggests that technical leads should focus more on the social interaction and work management dimensions of peer management in order to achieve greater success with the groups they manage, while people managers should focus on improving communication.

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Appendices

Appendix A: On-Line Survey

Appendix A – On-line Survey

** Note, questions 1-27 were answered by the people manager group while
questions 28-53 were answered by the technical lead group

People Managers versus Technical Leads: Which management type is more accepted by the group they manage when the group they manage is comprised of their former peers?

My name is Franz Bruckner, and I am a graduate engineering management student at the University of Colorado, Boulder. First off, I would like to "thank you" for taking the time to learn about this survey. This survey is being conducted with the cooperation of the Mile Hi Chapter of the Project Management Institute so I also want to thank the PMI leadership team for supporting my research.

I am conducting research on the "level of acceptance" associated with peer management among both People Managers and Technical Lead managers with regards to their FIRST management experience. For purposes of this survey, I provide the following definitions for both manager types:

a). People Managers (responsible for Human Resource aspects of employee management such as merit pay, performance, etc…)

b). Technical Leads (manages the technical aspects of the business. No Human Resource responsibility)

The goal of my survey is to see if there is a statistically significant difference in the group acceptance of a People Manager or Technical Lead who manages his/her former peers versus a People Manager or Technical Lead who is not managing his/her former peers.

Please take 10-15 minutes to complete the 25 to 27 questions associated with this survey. Also note, it will not be possible to go back to a previous question once you have entered the "submit" button.

All responses will be kept strictly confidential. I also want to invite you all to share in the results of the survey, so I will be making my final report available to all of you.

Thanks again for taking the time to complete my survey.

Franz Bruckner, M.E. Candidate CU Boulder

1. Please identify the type of management you performed upon receiving your FIRST management type role:

🔵 People Manager (primary focus employee performance, hiring, etc...)

🔵 Technical Lead (primary focus technical work)

2 Please indicate the type of facility you worked in when you managed a group for the first time as a people manager:

🔵 Union shop - White Collar

🔵 Union Shop - Blue Collar

🔵 Non-Union - White Collar

🔵 Non-Union - Blue Collar

3. Please describe the industry you work in:

○ Government (Federal, State, or Local)

○ For Profit (High Tech/Aerospace)

○ For Profit (Not High Tech/Aerospace)

○ Other (please hit "submit" to write-in answer on the next page)

4. Please write-in the industry you work in:

5. In your capacity as a first-time Manager did you manage peers that you formerly worked with (i.e., your former peer group)?

YES   NO

6. Please describe the amount of formal group communication you had with the group you managed during your time as their People Manager (department meetings, etc…):

⬤ Daily

⬤ Weekly

⬤ Bi-weekly

⬤ Monthly

⬤ None

⬤ Other (please hit "submit" to write-in answer on the next page)

7. Please specify the "other" amount of formal communication you had with the group you managed:

8. Please describe the amount of formal individual communication you had with the people you managed during your time as their People Manager (1 on 1 meetings, etc…):

◯ Daily

◯ Weekly

◯ Bi-weekly

◯ Monthly

◯ None

◯ Other (please hit "submit" to write-in answer on the next page)

9. Please specify the "other" amount of formal individual communication you had with the people you managed during your time as their People Manager:

10. When thinking about 1 on 1 communication, I had an "open door" policy with my employees (i.e., employees were encouraged to stop by any time).

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2		4	5

11. When thinking about 1 on 1 communication, I preferred that my employees schedule an appointment to meet with me:

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

12. During your role as a People Manager, how much turnover did you experience with your employee pool (turnover includes people that left and were replaced, as well as people that left and were not replaced)

- 0%

- 1-10% of the people you managed

- 11-24% of the people you managed

- 25-50% of the people you managed

- greater than 50% of the people you managed

13.   Using the list below, please select the different reasons your employees left the group:

◯ More money

◯ Unhappy with manager

◯ Unhappy with work

◯ Better opportunity within company

◯ Better opportunity outside of company

◯ Other (specify on next page)

14.   Please list any other reason that your employees may have left. If there are no other reasons, leave blank.

15. During my tenure as a people manager, my project (Admin/HR tasks) completion rate was as follows:

● completed projects 90% or more on or ahead of schedule

● completed projects 80% or more on or ahead of schedule

● completed projects 70% or more on or ahead of schedule

● completed projects less than 70% on or ahead of schedule

16. My group accepted me as their People Manager.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

17. My group respected me as their People Manager.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

18. My management training was "on the job training" (OJT) versus formal training.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

19. The majority of the team I managed and I spoke the same primary language.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

20. There were language barriers within the group I managed.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

21. The people I managed included me in their outside "get togethers" (non-work-related).

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

22. The people I managed felt comfortable talking about non-work related topics such as family vacations, personal hobbies, etc...with me.

Never	Rarely	sometimes	Frequently	Majority of the time
1	2	3	4	5

23. The people I managed felt comfortable talking about work and/or work related issues with me.

Never	Rarely	sometimes	Frequently	Majority of the time
1	2	3	4	5

24. The average age of the people I managed were _____ in age when compared to my age.

● Much Older

● Older

● About the same

● Younger

● Much Younger

25. I felt there was a generation gap between myself and my group as a whole.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

Please answer the following questions to help me better understand the demographical makeup of survey takers.

26. Please indicate your gender:

🔘 Female

🔘 Male

27. Please indicate the category that best describes your age demographic at the time of your management assignment:

🔘 22-30

🔘 31-40

🔘 41-50

🔘 51-60

🔘 greater than 60

28. Please indicate the type of facility you worked in when you managed a group for the first time as a Technical Lead:

○ Union shop - White Collar

○ Union Shop - Blue Collar

○ Non-Union - White Collar

○ Non-Union - Blue Collar

29. Please describe the industry you work in:

○ Government (Federal, State, or Local)

○ For Profit (High Tech/Aerospace)

○ For Profit (Not High Tech/Aerospace)

○ Other (please hit "submit" to write-in answer on the next page)

30. Please write-in the industry you work in:

31. In your capacity as a first-time Technical Lead did you manage peers that you formerly worked with (i.e., your former peer group)?

YES   NO

32. Please describe the amount of formal group communication you had with the group you managed during your time as their Technical Lead (department meetings, etc…):

Daily

Weekly

Bi-weekly

Monthly

None

Other (please hit "submit" to write-in answer on the next page)

33. Please specify the amount of formal communication you had with the group you managed:

[   ]

34. Please describe the amount of formal individual communication you had with the people you managed during your time as their Technical Lead (1 on 1 meetings, etc…):

🔘 Daily

🔘 Weekly

🔘 Bi-weekly

🔘 Monthly

🔘 None

🔘 Other (please hit "submit" to write-in answer on the next page)

35.   Please specify the amount of formal individual communication you had with the people you managed during time as their Technical Lead:

36.   When thinking about 1 on 1 communication, I had an "open door" policy with my employees (i.e., employees were encouraged to stop by any time):

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

37.   When thinking about 1 on 1 communication, I preferred that my employees schedule an appointment to meet with me.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

38. During the first year in your Technical Leadership role, how much turnover did you experience with your employee pool (turnover includes people that left and were replaced, and people that left and were not replaced):

🔘 0% of the people you managed

🔘 1-10% of the people you managed

🔘 11-24% of the people you managed

🔘 25-50% of the people you managed

🔘 greater than 50% of the people you managed

39. Using the list below, please select the different reasons your employees left the group:

🔘 More money

🔘 Unhappy with manager

🔘 Unhappy with work

🔘 Better opportunity within company

🔘 Better opportunity outside of company

🔘 Other (specify on next page)

40. Please list any other reason that your employees may have left. If there are no other reasons, leave blank.

[   ]

41. During my tenure as Technical Lead, my project completion rate was as follows:

○ completed projects 90% or more on or ahead of schedule

○ completed projects 80% or more on or ahead of schedule

○ completed projects 70% or more on or ahead of schedule

○ completed projects less than 70% on or ahead of schedule

42. My group accepted me as their Technical Lead.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3		5

43. My group respected me as their Technical Lead.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	2	3	4	5

44. My technical management training was "on the job training" (OJT) versus formal technical training.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

45. The majority of the team I managed and I spoke the same primary language.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

46. There were language barriers within the group I managed.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

47. The people I managed included me in their outside "get togethers" (non-work-related).

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

48. The people I managed felt comfortable talking about non-work related topics such as family outings, personal hobbies, etc… with me.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

49. The people I managed felt comfortable talking about work and/or work related issues.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

50. The average age of the people I managed were _____ in age when compared to my age.

- Much Older
- Older
- About the same
- Younger
- Much Younger

51. I felt there was a generation gap between myself and my group as a whole.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

Please answer the following questions to help me better understand the demographical makeup of survey takers.

52. Please indicate your gender:

◉ Female

◉ Male

53. Please indicate the category that best describes your age demographic at the time of your management assignment:

◉ 22-30

◉ 31-40

◉ 41-50

◉ 51-60

◉ greater than 60