WORKSHEET + WORKED EXAMPLE

Prepare for Your Next Leadership Role

A role-transition plan that names what to learn, stop, and make possible for others.

25 minutes | Leadership Pipeline · Skills / Time / Work values

Use it in three moves

1. Name the transition and check what the new role actually needs. Use the pipeline as a prompt, not a required career ladder.

2. Look separately at skills, time, and what counts as a useful contribution. Decide what you need to learn, stop, or hand over.

3. Agree expectations and support with your manager and team. Choose early checkpoints that examine both results and how your approach affects others.

Name the transition

The classic pipeline moves from managing self to others, managers, a function, a business, a group, and an enterprise. Use the relevant transition; careers need not follow this ladder.

Skills · What must you learn or use differently?

Identify real tasks and evidence of readiness, not a generic competency label.

Time · What will you stop, delegate, or protect?

Name existing work that must move and who will be supported to take it.

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YOUR WORKING NOTES / CONTINUED

Work values · What now counts as a useful contribution?

Examine habits around control, expertise, recognition, and helping others succeed.

Agree support with your manager and team

Clarify authority, expectations, learning opportunities, feedback, and access.

Choose evidence and checkpoints

Check both outcomes and the effect of your behavior. Keep the transition revisable.

A question for me

What do I keep doing because it proves I am useful, even though someone else now needs to own it?

See one way through

FICTIONAL WORKED EXAMPLE / NOT THE ANSWER TO YOUR SITUATION

Name the transition

Moving from leading individual contributors to leading two team managers.

Skills · What must you learn or use differently?

Coach managers on priorities and support; coordinate across teams; avoid becoming the unofficial decision owner for every task.

Time · What will you stop, delegate, or protect?

Stop reviewing every routine handoff. Protect time for manager coaching and cross-team capacity decisions.

Work values · What now counts as a useful contribution?

A useful week includes managers making sound decisions without me, not only visible problems I personally solved.

Agree support with your manager and team

Agree the decisions retained by managers, a monthly coaching check, and a mentor for cross-team planning.

Choose evidence and checkpoints

At 30 and 60 days, ask managers where my involvement helped or crowded out their authority.

The thinking behind it

A promotion changes the conditions you create for others. Notice where an old strength becomes a new bottleneck.

The Leadership Pipeline, associated with Ram Charan, Stephen Drotter, and James Noel, describes role transitions involving skills, time application, and work values. This original transition guide explains the classic passages without treating them as a compulsory career ladder or a measure of personal worth.

Leadership Pipeline Institute

Read You Have a Culture Problem by Nic Payne