



Guide to Transitioning from an Individual Contributor to a Manager

Step 1 – Questions to ask yourself

- Why do I want to become a Manager? Is it for an increase in pay or prestige or is it because I want to help my team members achieve their goals?
- Am I a consistent top performer? Am I good enough at this job that I should be coaching others how to do it?
- Am I ready to be a full-time Manager and have no personal sales?
- Would I prefer a hybrid role where I am able to lead from my front by still carrying a quota while managing a small team?
- Am I a leader? Outside of work, what other leadership positions have prepared me for this role? For instance, participating in a Board for a charity, being the captain of a sports team or taking on a leadership role in a sorority.

- Am I mentally prepared to take on the responsibility management activities like putting employees on performance improvement plans or terminating them for non-performance?
- This is certainly non an all-inclusive list, but too often ICs advocate to move into a managerial role because it seems like the next step in their career without considering the broader implications and responsibilities of the role.

Step 2 – Start laying the foundation

- Have a conversation with your direct Manager. Let that person know that you would like to be considered for a managerial role. Ask them what they think makes a manager successful at the company. Follow this conversation up with an email recapping your conversation that you can later use for reference if required.
- Connect with HR. Understand what the “next steps” are in your organization. Do you have to be with the company for a certain amount of time before you can achieve promotion, is there a formal review process or do you need to have achieved a specific revenue contribution first.
- Find a mentor. Find a peer who has made the move from IC to Manager. Connect with them to get guidance and insight to better inform your decision-making. This person can be in a different business unit.
- Start leading. You do not have to be a manager to be a leader. Help your team members in a non-intrusive way. Share emails or talk tracks that are resonating with customers, show them a tip to save time on Salesforce, offer to help onboard a new hire.
- As a manager one of your responsibilities is to be the voice of the business. Think about how you discuss decisions your current manager makes or a change to the commission structure. Is this how you would present it to the team if you were their manager? If not, you might be need shift the types of conversations you are having with your colleagues.

Step 3 – Map out your pay expectations

A little-known reality of moving from an IC to a Manager, is that many sales organizations will have an OTE structure that will result in you taking a pay cut.

This is particularly true if you’re moving into a pure managerial role with no personal target. From the company perspective, you are no longer a direct revenue contributor, so they are not about to pay you the same massive commissions as closers get.

From your perspective, you may be thinking – wait, I am taking on more responsibility to get paid less?

- Talk to HR. Get an understanding of what the override or bonus structure looks like for a Manager.

- Be ready to negotiate on your base pay. OTE for Managers is different than OTE for ICs. Why? Because you are no longer in control of your own paycheck. Now you are relying on your team to perform to ensure you get paid the full amount of your on-track earnings potential.
- Look at your current earnings and try to map out what a first year as a Manager would look like. How big is your team? Are they all performers? If one of them quits, do you have a commitment from the company that the role will be filled immediately? Are other Managers achieving override targets? What bonus is in place for you if your reps achieve 100%+ of their quota? Right now, if you were to start managing an “average” salesperson, what percent to target are they achieving?
- It is important to clearly map out what your earning potential is as a Manager, ensure that the new title and responsibility is worth the potential decrease in pay, and be ready with the facts so that you can negotiate a fair base.

Step 4 – Get promoted

- As for a 1-1 meeting with your direct Manager and clearly state that you are ready to be promoted to a Manager role. Share the steps you have taken to ready yourself. Follow this conversation up with a summary email that you can reference later if required.
- Understand the timeline. Is a promotion available only when another Manager leaves or when the company is growing? How can that path to promotion be expedited?
- Formalize your path to promotion. During review with your Manager, make sure your intention to become a Manager and the work you have already done is clearly stated in your employee paperwork.
- If your Manager declines or postpones your request for a promotion, have them clearly outline the reasons. Work together to create a written road map with achievable milestones and a clear deadline.
- Make your intention known to other senior- team Members. For instance, John I would like to sit in on the training you are doing with the new hires next month. I am in discussions with Ms. Manager about moving into a managerial role, so I'd like to see how you do things.
- Lead by example. Continue to maintain high sales numbers. Have the mindset of a manager by taking a positive tone about the company and going beyond the job description to support the team where appropriate.

What your Sales Manager might be thinking about your promotion but not saying out loud:

There may be unspoken objections that are holding you back from promotion.

- This employee is not a top performer, why would I promote them?
- This employee is not a consistent performer; can I count on them as a Manager?
- This employee is not a team player; I do not think they would make a good Manager.
- This employee is a top performer and is a team Member that I cannot afford to lose, I suppose that I must promote them, but I do not think they will make a good Manager.
- This employee has good sales numbers, but they do not follow any of the company rules or processes (think pipeline reports, CRM entries, handover process), I do not trust them to teach their direct reports those rules & processes which will make the problem worse.
- This employee's behavior at work happy hours is unprofessional and embarrassing, I do not think the team would respect them as a Manager.

Of course, this list is not exhaustive but it's important to have a glimpse of what your management team is considering when they think about promoting an IC into a managerial role. Make sure that you have thought out responses to these potential objections.

These steps are certainly not exhaustive, but I hope that do provide you with a thought-provoking playbook to help you prepare for your promotion.

Good luck and happy selling!