

# A New Manager's Playbook: Know, Support, Lead

## Storyboard & Narration Script

Solara Health Consulting | Manager Onboarding Program

Version 2.0 | May 2026 | iSpring Suite | 17 Slides

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### How to Use This Document

**Screenshot:** Full-slide visual capture showing the layout and visual design of each slide.

**On-Screen Text:** The shorter visual text that appears on the slide. Not a copy of the narration.

**Narration:** The full audio script for recording or AI narration. This is also the closed caption source. Tone: warm, direct, conversational.

**Interaction Type:** Listed in the slide number column. Indicates the iSpring interaction used on that slide.

**Developer Note:** Listed below is a screenshot of the iSpring implementation instructions, interaction types, and asset guidance.

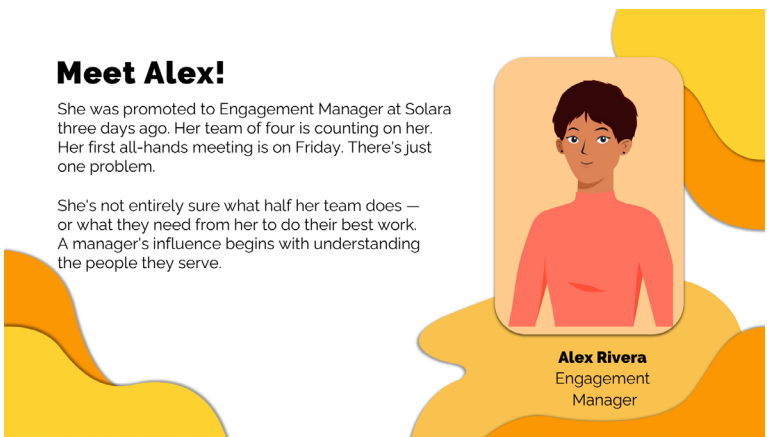
*Estimated total narration time: 20-25 minutes at a moderate pace.*

*Leadership frameworks integrated: Servant Leadership (Slides 2, 4, 9, 17) and Coaching vs. Directing (Slides 9, 11).*

SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
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**OPENING**

<p><b>1</b> None</p>	 <p><b>A New Manager's Playbook: Know, Support, Lead</b></p> <p>Solara Health Consulting   Manager Onboarding Program</p> <p>Start</p> <p><i>Section: Opening</i> <b>Title Slide</b></p> <p><i>Developer note: Apply the Honey template adapted to navy and gold. Alex is the protagonist character and appears consistently across Slides 1, 2, 4, 9, and 12. Select a professional, mid-career character from the iSpring Content Library. This slide has no interaction.</i></p>	<p>A New Manager's Playbook: Know, Support, Lead Solara Health Consulting   Manager Onboarding Program [Alex character visual — professional, approachable, at her desk reviewing her calendar]</p>	<p>Welcome to A New Manager's Playbook: Know, Support, Lead! Part of the Solara Health Consulting Manager Onboarding Program. Whether you were just promoted or you are stepping into a new team for the first time, the next few weeks are going to define how your people see you as a manager. This course is designed to help you start strong. You will learn to understand what your team does, how work moves through your team, and how to set clear expectations that build trust early. It takes about 20 to 25 minutes, and you can navigate in any order. When you are ready, let's get started.</p>
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<p><b>2</b> None</p>	 <p><b>Meet Alex!</b></p> <p>She was promoted to Engagement Manager at Solara three days ago. Her team of four is counting on her. Her first all-hands meeting is on Friday. There's just one problem.</p> <p>She's not entirely sure what half her team does — or what they need from her to do their best work. A manager's influence begins with understanding the people they serve.</p> <p><b>Alex Rivera</b> Engagement Manager</p> <p><i>Section: Opening</i> <b>The Business Hook</b></p> <p><i>Developer note: Alex is shown at her home desk, laptop open, slightly uncertain but composed. Animate on-screen text in two beats: intro first, then</i></p>	<p>Meet Alex! She was promoted to Engagement Manager at Solara three days ago. Her team of four is counting on her. Her first all-hands meeting is on Friday.</p> <p>There's just one problem.</p> <p>She's not entirely sure what half her team does or what they need from her to do their best work.</p> <p>A manager's influence begins with understanding the people they serve.</p>	<p>Meet Alex Rivera! Three days ago, she was promoted to Engagement Manager at Solara Health Consulting. She is talented, driven, and genuinely excited about the role. Her team of four is expecting her to show up on Friday with a plan. But as Alex reviews her calendar Sunday night, she realizes something uncomfortable: she knows her team's names. She knows their titles. But she is not entirely sure what each of them does day to day, how their work connects, or what they need from a manager to do their best work. Here is what separates managers who struggle from managers who thrive in the first 30 days: the ones who thrive understand something fundamental. Your influence as a manager does not come from your title or your expertise.</p>
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SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
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*the pause and problem reveal. The servant leadership framing line appears last as a standalone statement—audio narration with closed captions.*

It comes from how well you understand and serve the people on your team. That is the idea at the heart of servant leadership — and it is what this course is built on.

**3**  
*Accordion /  
 Tabbed  
 Interaction*

 Interaction  
 Click the **Interaction** button to edit this object

**Learning Objectives**

Know Your Team

Track the Work

Set Expectations

Read the Signals

**Know Your Team**

Describe the core responsibilities of each role on your team and how those roles connect.

*Section: Opening*  
**Learning Objectives**  
*Developer note: Accordion or tabbed interaction. Each tab reveals one LO with a supporting icon: org chart (LO1), flow arrow (LO2), checklist (LO3), flag (LO4). The learner must click through all four before Next activates.*

By the end of this course, you will be able to:

LO1: Describe the core responsibilities of each role on your team and how those roles connect.

LO2: Identify how work flows through your team and where early breakdowns are most likely.

LO3: Apply a framework for setting clear expectations with direct reports in your first 30 days.

LO4: Recognize early warning signs of disengagement and select an effective response.

Before we dive in, here is what you can expect to take away. By the end of this course, you will be able to describe the core responsibilities of each team member and understand how those roles connect. You will be able to identify how work moves through your team and where the most common breakdowns happen in the first 30 days. You will be able to apply a practical framework for setting clear expectations with your direct reports early on. And you will be able to recognize the early warning signs that something is off with a team member and respond accordingly. Everything in this course is grounded in real situations that new managers at Solara face. Let's get into it.

**SECTION A — KNOW YOUR TEAM**

SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
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**4**  
Hotspot /  
Tabbed  
Interaction

Interaction

Click the **Interaction** button to edit this object

**Section: Section A — Know Your Team**  
**Meet Your Team**

**Developer note:** Each team member appears as a character card. Default view: name, title, role summary. On click: Manager Support Layer reveals — one sentence on what that role needs most from Alex. Diana: autonomy and clear escalation paths. Andre: clear priorities and timely decisions. Zoe: regular specific feedback and clear quality expectations. Jacqueline: advance visibility into project scope changes.

Alex's Team at Solara Health Consulting:

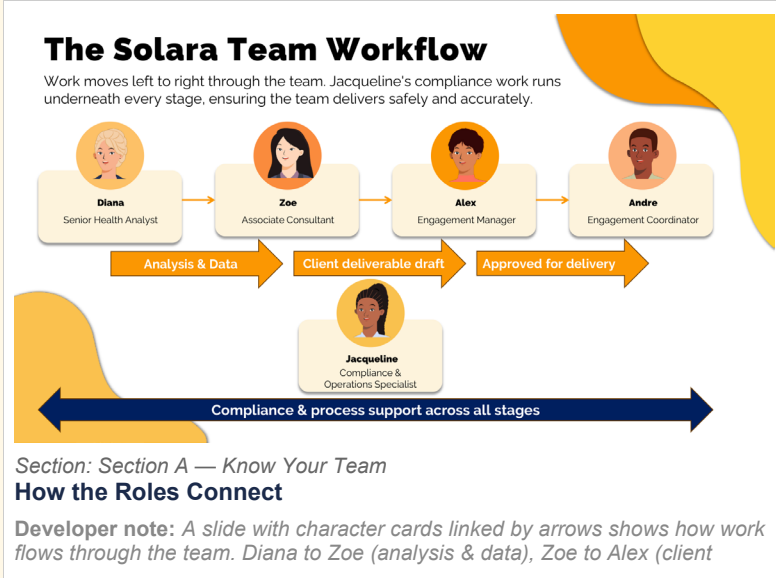
Diana — Senior Health Analyst  
Andre — Engagement Coordinator  
Zoe — Associate Consultant, Health Systems  
Jacqueline — Compliance & Operations Specialist

[Select each team member to learn their role + what they need from Alex]

"A servant leader's first question is not: what do I need from this person? It is: what does this person need from me?"

Let's meet Alex's team. She has four direct reports, each playing a distinct role in how Solara delivers for its clients. Diana is the Senior Health Analyst. She owns the data and reporting side of the work. Andre is the Engagement Coordinator — the operational backbone of the team. Zoe is the Associate Consultant, Health Systems — earlier in her career and still building skills. Jacqueline is the Compliance and Operations Specialist. Her work is less visible but foundational. As a servant leader, Alex's starting point is not 'here is what I need from each of you.' It is 'here is what each of you needs from me.' Select each team member to explore their role and what kind of support they need most from Alex.

**5**  
Static Visual /  
Infographic




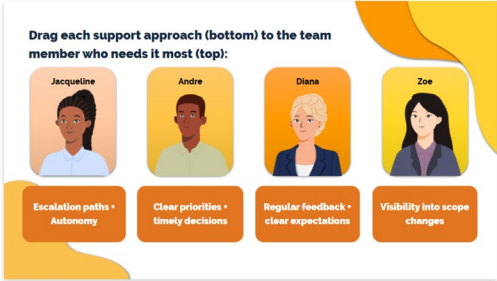
The Solara Team Workflow

Work moves left to right through the team. Jacqueline's compliance work runs underneath every stage, ensuring the team delivers safely and accurately.


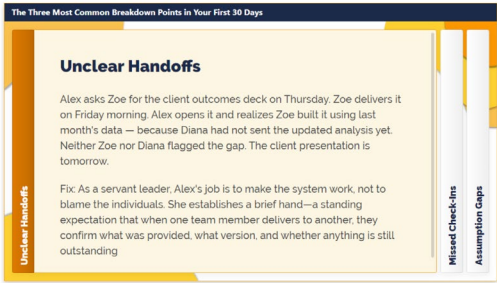
Diana (Analysis & Data) → Zoe (Client deliverable draft) → Alex (Review) → Andre (Approved for delivery)

Jacqueline: Compliance & process support across all stages

Now that you know who is on Alex's team, let's look at how the work moves. The workflow runs left to right. Diana starts the process — her analysis and data are the foundation. That output goes to Zoe, who drafts the client deliverable. From there, the draft goes to Alex for review and approval. Once Alex approves it, Andre manages the delivery. Underneath every stage, Jacqueline's compliance and process work run in the background. As the manager, Alex touches the middle of this workflow, not just the end. Her ability to keep each handoff clean and each stage moving is what determines whether the team delivers on time and on standard.

SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
<p><b>6</b></p> <p>Drag-and-Drop (Formative)</p>	<p>deliverable draft), Alex to Andre (approved for delivery), and Jacqueline below parallel to all positions.</p> <p style="text-align: center;"> Quiz</p> <p style="text-align: center;">Click the Quiz button to edit this object</p>  <p>Section: Section A — Know Your Team <b>Knowledge Check: Role Clarity</b></p> <p>Developer note: iSpring drag-and-drop interaction. Four drop zones (one per team member), four draggable cards (one per support approach). Per-item feedback appears after submission. Incorrect matches show the correct answer with rationale. Formative only — no score recorded.</p>	<p>Drag each support approach to the team member who needs it most.</p> <p>Team members: Diana   Andre   Zoe   Jacqueline</p> <p>Support approaches:</p> <ul style="list-style-type: none"> <li>A. Regular feedback on deliverable quality and clear expectations</li> <li>B. Escalation paths and autonomy to work independently</li> <li>C. Clear priorities from Alex and timely decision-making</li> <li>D. Advance visibility into scope changes that affect compliance and process work</li> </ul>	<p>Before we move on, let's check your understanding. You will see four team members and four support approaches. Drag each approach to the team member who needs it most. Take your time — the feedback will explain the reasoning behind each correct match.</p> <p>Correct answers: Diana → B, Andre → C, Zoe → A, Jacqueline → D</p>

**SECTION B — SUPPORT THE WORK**

<p><b>7</b></p> <p>Accordion / Flip Card (3 panels)</p>	<p style="text-align: center;"> Interaction</p> <p style="text-align: center;">Click the Interaction button to edit this object</p>  <p>Section: Section B — Support the Work <b>Where Breakdowns Happen</b></p>	<p>The Three Most Common Breakdown Points in Your First 30 Days</p> <p>[Select each to reveal]</p> <ol style="list-style-type: none"> <li>1. Unclear Handoffs</li> <li>2. Missed Check-Ins</li> <li>3. Assumption Gaps</li> </ol>	<p>Even when everyone on your team is capable and motivated, things can go sideways in the first 30 days — not because of bad intentions, but because of transition friction. Here are the three breakdown points that catch new managers most often: unclear handoffs, missed check-ins, and assumption gaps. Select each one to see what it looks like at Solara and what you can do about it.</p>
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SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
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	<p><b>Developer note:</b> <i>iSpring accordion or flip card interaction. One panel per breakdown — each contains a Solara scenario that illustrates the problem and a concrete servant-leadership fix. The learner must open all three before Next activates. No graded component.</i></p>		
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<p><b>8</b></p> <p>Static Content + Downloadable Job Aid</p>	<p><b>The 30-Day Listening Tour</b></p> <p>A Servant Leader's First Move: In your first two weeks, schedule a 20-minute 1:1 with each direct report.</p> <p><b>Ask three questions:</b></p> <ol style="list-style-type: none"> <li><b>1</b> What does your day-to-day work look like right now?</li> <li><b>2</b> What is one thing that would help you do your best work?</li> <li><b>3</b> Is there anything I should know as I step into this role?</li> </ol> <p><i>Listen. Take notes. Do not problem-solve yet.</i></p> <p>Section: Section B — Support the Work</p> <p><b>The 30-Day Listening Tour</b></p> <p><b>Developer note:</b> <i>Include a downloadable PDF job aid attached via iSpring: '30-Day Listening Tour Guide.' The one-pager includes the three questions, a note-taking template, and a brief coaching note on listening posture. Alex's character appears in a 1:1 meeting setting.</i></p>	<p>The 30-Day Listening Tour — A Servant Leader's First Move</p> <p>In your first two weeks, schedule a 20-minute 1:1 with each direct report.</p> <p>Ask three questions:</p> <ol style="list-style-type: none"> <li>1. What does your day-to-day work look like right now?</li> <li>2. What is one thing that would help you do your best work?</li> <li>3. Is there anything I should know as I step into this role?</li> </ol> <p>Listen. Take notes. Do not problem-solve yet.</p> <p>[Download: 30-Day Listening Tour One-Pager]</p>	<p>Here is one of the most effective things you can do in your first two weeks: the 30-day listening tour. Schedule a 20-minute one-on-one with each direct report. Not a performance conversation. Not a goal-setting meeting. A listening conversation. Ask three questions: What does your day-to-day work look like right now? What is one thing that would help you do your best work? And is there anything I should know as I step into this role? Then listen. Take notes. Do not problem-solve in the moment. Download the one-pager to use as a reference during those conversations.</p>
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**SECTION C — LEAD WITH CLARITY**

<p><b>9</b></p> <p>Visual Diagram (Circular) — No Learner Interaction</p>	<p><b>Clarity-Consistency-Feedback Loop</b></p> <p><b>Clarity</b></p> <p>Define what good work looks like. Be specific about standards, formats, and outcomes.</p> <p>Use <b>SMART</b> goals as your clarity standard.</p>	<p>The Clarity-Consistency-Feedback Loop</p> <p>CLARITY — Define what good work looks like. Be specific about standards, formats, and outcomes. Use SMART goals as your clarity standard.</p> <p>CONSISTENCY — Show up the same way every week. Predictable managers build psychologically safe teams.</p>	<p>Setting expectations is not a one-time event. It is a practice. The framework that ties it together is the Clarity-Consistency-Feedback Loop. Clarity means being specific about what good work looks like — SMART goals are your clarity standard. Consistency means showing up the same way week after week. Predictable managers create psychologically safe environments. Feedback means closing the loop — acknowledging what is working and addressing what is not while it is still small. Your approach should also flex based on where each</p>
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SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
<p><b>10</b></p> <p>Matching Interaction (Formative)</p>	<p>Section: Section C — Lead With Clarity</p> <p><b>Setting Expectations Early</b></p> <p><b>Developer note:</b> Present the Clarity-Consistency-Feedback Loop as a visual circular diagram with three labeled sections. Coaching vs. directing callout box appears below. Narration walks through each element as it highlights on screen. Concept introduction slide — no learner interaction.</p>	<p>FEEDBACK — Close the loop. Acknowledge what is working. Address what is not while it is still small.</p> <p>Coaching vs. Directing: Your approach should flex based on where each person is.</p>	<p>person is: coach Diana by creating space and deferring to her expertise; provide more structure and direction for Zoe as she builds her skills, then shift toward coaching as she grows.</p>
	 <p><b>Knowledge Check: Four Early Warning Signs — and How to Respond</b></p> <p>Match each signal to the right manager response.</p> <p>Disengagement cues      Revisit your clarity conversation</p> <p>Priority confusion      Have a direct, non-punitive conversation</p> <p>Missed deliverable (first time)      Make it easier and safer to show up</p> <p>Avoidance of 1:1s      Name it privately and with curiosity</p> <p>Section: Section C — Lead With Clarity</p> <p><b>Recognizing Early Warning Signs</b></p> <p><b>Developer note:</b> iSpring matching interaction. Four signals on the left, four responses on the right, scrambled. Each correct match triggers feedback narration. Incorrect matches prompt a retry before the answer is revealed. Formative only — no score recorded.</p>	<p>Four Early Warning Signs — and How to Respond</p> <p>[Matching interaction — match each signal to the right manager response]</p> <p>Signal 1: Disengagement cues (short answers, camera off, minimal participation)</p> <p>Signal 2: Confusion about priorities (asking the same clarifying questions repeatedly)</p> <p>Signal 3: Missed or late deliverable (first occurrence)</p> <p>Signal 4: Avoidance of 1:1s (rescheduling, canceling, arriving unprepared)</p>	<p>Even when your team appears to be performing, there are early signals worth paying attention to. Catching these in the first 30 days is far easier than addressing them at month three. You will see four warning signs. For each one, match it to the response you think is most effective. Remember: a servant leader approaches these signals with curiosity first, not accountability first.</p> <p>Correct matches: Disengagement cues → Name it privately and with curiosity   Priority confusion → Revisit your clarity conversation   Missed deliverable (first time) → Have a direct, non-punitive conversation   Avoidance of 1:1s → Make it easier and safer to show up</p>

SLIDE

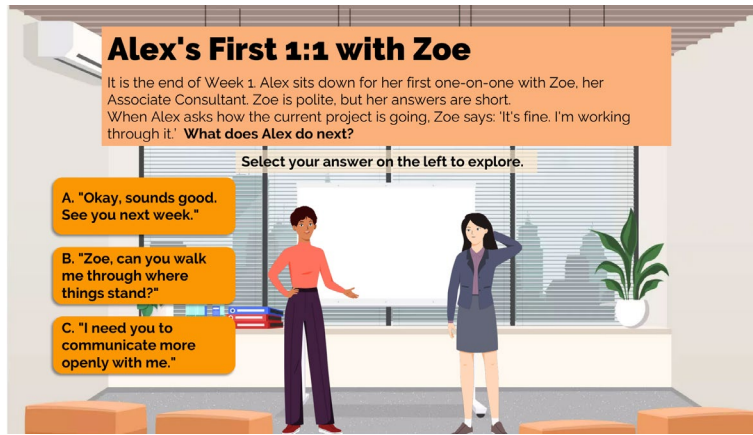
SCREENSHOT

ON-SCREEN TEXT

NARRATION

11

Branching Scenario (3 paths)



Section: Section C — Lead With Clarity  
Scenario: Alex's First 1:1 with Zoe

Developer note: iSpring role-play simulation or branching scenario. Option B is the correct path. Options A and C show consequence screens with feedback narration, then offer a retry. After selecting Option B, a debrief screen appears before moving forward. Alex and Zoe characters; small conference room background.

Alex's First 1:1 with Zoe

It is the end of Week 1. Alex sits down for her first one-on-one with Zoe. Zoe is polite, but her answers are short. When Alex asks how the current project is going, Zoe says: 'It's fine. I'm working through it.'

What does Alex do next?

- A. "Okay, sounds good. See you next week."
- B. "Zoe, can you walk me through where things stand?"
- C. "I need you to communicate more openly with me."

It is the end of Alex's first week, and she sits down for her first one-on-one with Zoe. Three minutes in, something feels off. Zoe's answers are minimal and guarded. When Alex asks how the current project is going, Zoe says: 'It's fine. I'm working through it.' Alex has a choice to make. This is a coaching versus directing moment — and the right call here will tell Zoe everything she needs to know about the kind of manager Alex will be.

- Option A (Incorrect): Avoidance — closes the conversation before it starts.
- Option B (Correct): Coaching — open, non-threatening question creates space.
- Option C (Incorrect): Premature directing — reduces communication rather than increasing it.

12

Branching Feedback Screen

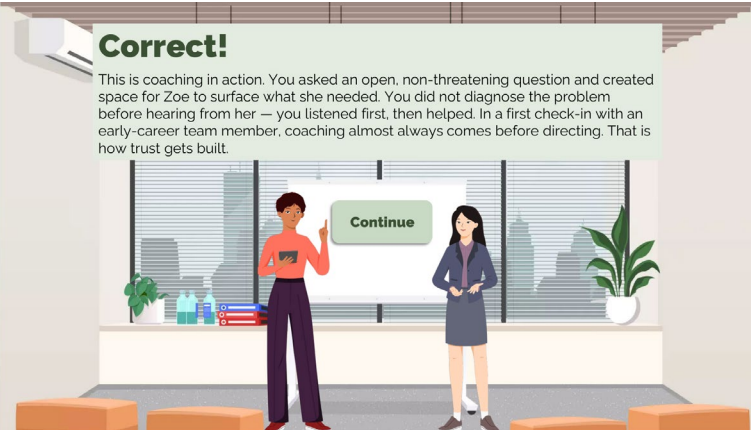
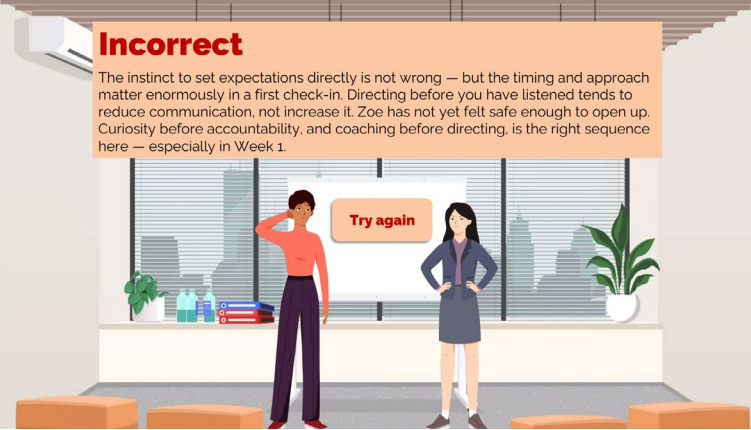


Section: Section C — Lead With Clarity  
Incorrect Feedback — Option A

Developer note: Consequence screen for Option A (avoidance). Shows outcome: Zoe misses a deadline the following week; she had been unclear on the scope and did not feel comfortable asking for help. When feedback narration plays, the Try Again button appears.

Incorrect  
Try again

Accepting 'it's fine' at face value in an early check-in closes the conversation before it starts. Zoe did not feel safe enough to raise a concern yet — and that is a signal, not a verdict. In a first 1:1, avoidance is never the coaching move.

SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
<p><b>13</b></p> <p><i>Branching Feedback Screen</i></p>	 <p><b>Correct!</b></p> <p>This is coaching in action. You asked an open, non-threatening question and created space for Zoe to surface what she needed. You did not diagnose the problem before hearing from her — you listened first, then helped. In a first check-in with an early-career team member, coaching almost always comes before directing. That is how trust gets built.</p> <p>Section: Section C — Lead With Clarity  <b>Correct Feedback — Option B</b></p> <p><b>Developer note:</b> Correct path feedback screen for Option B. Shows the outcome: Zoe admits uncertainty, Alex clarifies expectations and confirms the handoff with Diana, and Zoe completes the deliverable on time. Debrief text: 'You listened before you directed. You coached before you judged.' The continue button advances to the quiz.</p>	<p>Correct! Continue</p>	<p>This is coaching in action. You asked an open, non-threatening question and created space for Zoe to surface what she needed. You did not diagnose the problem before hearing from her — you listened first, then helped. In a first check-in with an early-career team member, coaching almost always comes before directing. That is how trust gets built.</p>
<p><b>14</b></p> <p><i>Branching Feedback Screen</i></p>	 <p><b>Incorrect</b></p> <p>The instinct to set expectations directly is not wrong — but the timing and approach matter enormously in a first check-in. Directing before you have listened tends to reduce communication, not increase it. Zoe has not yet felt safe enough to open up. Curiosity before accountability, and coaching before directing, is the right sequence here — especially in Week 1.</p> <p>Section: Section C — Lead With Clarity  <b>Incorrect Feedback — Option C</b></p> <p><b>Developer note:</b> Consequence screen for Option C (premature directing). Shows outcome: Zoe nods but shuts down further. Over the following weeks, she becomes Alex's least communicative team member. When feedback narration plays, the Try Again button appears.</p>	<p>Incorrect Try again</p>	<p>The instinct to set expectations directly is not wrong — but the timing and approach matter enormously in a first check-in. Directing before you have listened tends to reduce communication, not increase it. Zoe has not yet felt safe enough to open up. Curiosity before accountability, and coaching before directing, is the right sequence here — especially in Week 1.</p>

SLIDE

SCREENSHOT


ON-SCREEN TEXT

NARRATION

CLOSING

15


Quiz (iSpring Quiz Maker — 5 Questions)

 Quiz

Click the Quiz button to edit this object

**End-of-Course Quiz**

You have 5 questions. You need to score at least 80% to complete the course. Read each question carefully. The feedback will explain the reasoning behind each answer.



*Section: Closing*  
**End-of-Course Quiz**  
 Developer note: 5 multiple-choice questions aligned to all 4 LOs; Solara/Alex context throughout. Passing score: 80% (4 of 5). Detailed rationale feedback per question. Questions test application and judgment, not recall.

End-of-Course Quiz

You have 5 questions. You need to score at least 80% to complete the course. Read each question carefully. The feedback will explain the reasoning behind each answer.


You have covered a lot of ground. Before we wrap up, let's see how it all came together. You will have 5 questions, and you need to get at least 4 correct to complete the course. Each question includes feedback that explains the reasoning — grounded in the frameworks and principles you just worked through. Good luck.

16

Open-Ended Text Entry (Ungraded)

**Before you go, take a moment. Think about your own team. Which of Alex's challenges resonates most with you right now? What is one specific action you will take in your first 30 days? Try to name a person, a date, or both.**

Your response is private and ungraded.

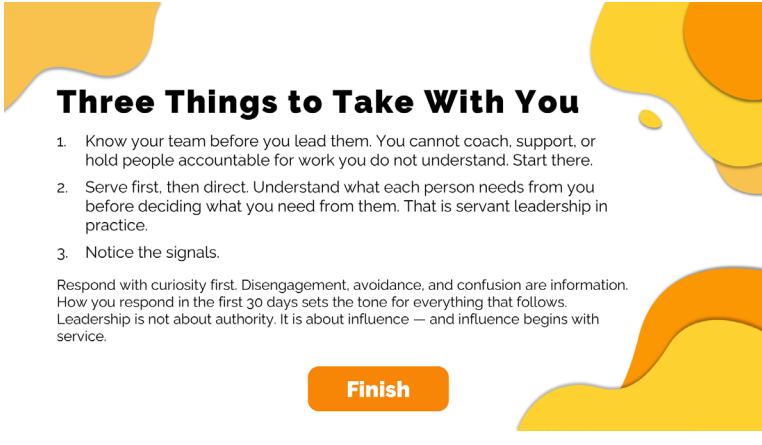


*Section: Closing*  
**Reflection Prompt**  
 Developer note: Metacognitive reflection prompt. Text entry box — response is ungraded and private. Encourages transfer to the learner's real work context. Alex's character appears alongside the prompt.

Before you go, take a moment. Think about your own team. Which of Alex's challenges resonates most with you right now? What is one specific action you will take in your first 30 days? Try to name a person, a date, or both.

Your response is private and ungraded.

Before you finish, take a moment to connect what you just learned to your own situation. Think about which of Alex's challenges resonates most with where you are right now. What is one specific action you will take in your first 30 days? Try to name a person, a date, or both. Your response is private and ungraded — this is just for you.

SLIDE	SCREENSHOT	ON-SCREEN TEXT	NARRATION
<p><b>17</b> None</p>	 <p><b>Three Things to Take With You</b></p> <ol style="list-style-type: none"> <li>1. Know your team before you lead them. You cannot coach, support, or hold people accountable for work you do not understand. Start there.</li> <li>2. Serve first, then direct. Understand what each person needs from you before deciding what you need from them. That is servant leadership in practice.</li> <li>3. Notice the signals.</li> </ol> <p>Respond with curiosity first. Disengagement, avoidance, and confusion are information. How you respond in the first 30 days sets the tone for everything that follows. Leadership is not about authority. It is about influence — and influence begins with service.</p> <p><b>Finish</b></p> <p><i>Section: Closing</i> <b>Three Things to Take With You</b> <i>Developer note: Closing summary slide. Static content — no learner interaction. The finish button appears at the bottom. Alex's character is visible.</i></p>	<p>Three Things to Take With You</p> <ol style="list-style-type: none"> <li>1. Know your team before you lead them. You cannot coach, support, or hold people accountable for work you do not understand. Start there.</li> <li>2. Serve first, then direct. Understand what each person needs from you before deciding what you need from them. That is servant leadership in practice.</li> <li>3. Notice the signals. Respond with curiosity first. Disengagement, avoidance, and confusion are information.</li> </ol> <p>How you respond in the first 30 days sets the tone for everything that follows. Leadership is not about authority. It is about influence — and influence begins with service.</p>	<p>Before you close this course, here are three things to take with you. First: know your team before you lead them. You cannot coach, support, or hold people accountable for work you do not understand. Start there. Second: serve first, then direct. Understand what each person needs from you before deciding what you need from them. That is servant leadership in practice. Third: notice the signals. Respond with curiosity first. Disengagement, avoidance, and confusion are information. How you respond in the first 30 days sets the tone for everything that follows. Leadership is not about authority. It is about influence — and influence begins with service.</p>