

## **NEW LEADER ASSIMILATION**

### **90-Day Plan Framework**

- Objectives – What you want to accomplish in terms of the people, role, stakeholders, operations, etc. over the first 90 days
  
- Three Phases – Outline what you plan to do in each phase
  1. Phase 1: Focuses on accelerated learning and establishing relationships with key stakeholders and your team (Days 0 – 15)
  2. Phase 2: Analysis and review of all information required to build the revised strategy, plan, structure, culture, operations, etc. (Days 16 – 65)
  3. Phase 3: Communication and implementation of the plans (Days 66 – 90)
  
- Outline information needed for each phase and key milestones for each phase for efficiency and to monitor your progress
  
- Complete stakeholder analysis and outline coalition building requirements
  
- Map in the Five Conversations with your new boss
  
- The purpose of the plan is to clarify your highest impact areas, focus your efforts, establish goals to help drive results, and plan accordingly

*Adapted from Michael Watkins, First 90 Days book.*

## Sample 90-Day Transition Plan Outline

### **My Key Transition Objectives**

1. Craft & deliver key messages
2. Clarify roles and expectations with key internal and external stakeholders
  - via “5 conversations” with CEO
  - via assimilation process
3. Promote myself: understand strengths and development needs for new role, incorporating learning from Hogan Potential and Challenge profiles
4. Develop and launch process for development of ER strategic plan with ER leaders and other key stakeholders
5. Understand and influence this years’ budget
6. Participate in and influence the company’s realignment
7. Assess “organizational shaping” needs (strategy/structure/people/culture/processes)
8. Outline preliminary new structure for ER and assess internal candidates (or gaps) for key leadership positions

I conceptualize this transition as incorporating the following three phases. While they are somewhat sequential, there will be significant overlap during the next 90 days.

1. **Discovery:** Learning through dialogue, listening, reading, interaction with key audiences, both internal and external to the Company (Weeks1-3)
2. **Diagnosis:** Situation analysis and assessment of the overall state of the Company and External Relations, challenges, opportunities, key changes needed (Weeks 4-10)
3. **Direction:** Preliminary conclusions about strategy, structure, people, processes and development of key goals/action plan for 2013 (Weeks 11-12)

### ***Promote Myself***

- Discuss Hogan Potential and Challenges with Dave Brookmire and identify strengths/development opportunities for this job

- ❖ Strengths: Adjustment, ambition, inquisitive
- ❖ Challenges: Skeptical, Intimidate junior staff, faster people decisions
- ❖ Build the behavioral “watch outs” into transition actions
- Identify critical aspects of job I prefer not to focus on and how to avoid procrastination in these areas (tbd)

### ***Accelerate Learning***

- Be visible and listen
- Meet with direct reports and other ER leaders regularly
- Proactively seek perspective from key stakeholders
  - ❖ CEO and COO
  - ❖ Strategic Senior Leadership Team beyond ER
  - ❖ Regional Leadership (calls with each over 90 days, but prioritize top 3 - 5)
  - ❖ Board Members: Consolidate relationship with heads of fundraising and marketing committees
  - ❖ External Colleagues: CEO and ER leaders at \_\_\_\_\_ and other organizations

### ***Match Strategy to Situation***

- Senior Leadership Team/Consultant Offsite (Sept 13-14)
- Diagnosis Conversation with CEO
- Dialogue with ER Unit Leaders

### ***Secure Early Wins***

- Deliver on CEO's early priorities
  - ❖ **Ad Council:** Visibly take leadership of effort; ensure coherent plan delivered and barriers to success/solutions identified; advocate for appropriate budget for regional response; in-person meeting with Ad Council leadership; outreach to CEO regarding funding partnership (Board Decision Sept 25-26)
  - ❖ **Relationships:** 3 Region Leaders, calls to Region Presidents and key Board members
  - ❖ **Annual Meeting Dinner:** Creative plan to maximize/publicize Awards

- ❖ **Research:** Help VP Research with plan to raise \$3.5M from regions for 2013 research agenda
- ❖ **Goals:** Develop 3 – 4 goals (with stretch opportunities) for me and CEO to discuss and agree on by October 1
- Identify additional “early win” opportunities by mid-October

### ***Negotiate Success***

- "5 Conversations" with CEO
  1. Situation (how boss sees the business situation): Sept
  2. Expectations: (negotiate expectations): mid-October
  3. Style: (how we can best interact) Ongoing
  4. Resources (negotiate for critical resources): timing tbd
  5. Development (how tenure in job contributes to personal development): March

### ***Achieve Alignment***

- "Organizational Shaping"
  - ❖ Input from consultant realignment process
  - ❖ Ongoing assessment and discussion with CEO/COO and SLT colleagues
  - ❖ Identify ER structure and leadership possibilities
  - ❖ Identify “roadblock” issues
  - ❖ ER Leadership Retreat to begin strategic visioning, plan development: late October/early November
  - ❖ People decisions – preliminary by the end of November

### ***Build the Team***

- Conduct team onboarding assimilation meeting (Brookmire)
- Develop personal criteria for leadership positions and use as filter to assess on board talent. Consider: competence, judgment, energy, focus, relationships, trust; share with team
- Over next three months, regular meetings with 3 key leaders as a group and 1x1
- Frequent meetings with unit heads. Follow-up on unit orientations (9/9-10) with unit leaders group meeting w/o 9/13.

- Create informal and fun opportunities to be with team (lunch outside bldg with one team member at least 1x per week; resist temptation to eat at desk every day); walk the halls; add art to the building—showcase the creativity our team develops by displaying it
- Executive coaching / 360s / development plans
- 1-on-1 Discussions (5 conversations)
- Understand people/leadership gaps

### ***Create Coalitions***

- Map influence landscape (by late October)
- Identify closest SLT allies
- Identify possible resisters and plans to handle
- By November, be able to count at least 5 Board and Region allies

### ***Keep Balance***

- Leave office no later than 6:30 daily, preferably 6:00
- Budget time to “be there” for spouse
- Maintain exercise regime (gym at least 2x week; run @ home at least 4x weekly – able to do 5K by Spring and Peachtree July 4)
- Plan vacation time – Thanksgiving and Christmas in KC

### ***Expedite Everyone***

- Expedite ER leaders’ transitions (TBD)
- Identify who I need to focus on quickly

### **Anything else you feel is critical to your onboarding?**

- Must get a handle on company’s financial structure
- Stay positive and pace myself (work fast, make decisions, set realistic expectations and negotiate iteratively based on progress)

For more information, please contact:

Dave Brookmire, Ph.D., President

[Corporate Performance Strategies, Inc.](#)

Office: 770-587-2265