

New Leader Onboarding: Best Practices for Success

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CLIENTS

Global industry-leading organizations including:

- Darden Restaurants, The Cheesecake Factory, Coca-Cola
- ADP, Platinum Equity, LexisNexis, Bekaert, Cisco, McKesson
- IHG, Flowers Foods, Arthritis Foundation, Colliers International
- Medical University of South Carolina, and many others

CREDENTIALS

- Advanced degrees
- Certifications in multiple assessments and coaching methodologies

EXPERIENCE

- Former senior executives
- An average of 20+ years' professional experience advising senior leaders
- Designed and implemented proven solutions and processes

MISSION

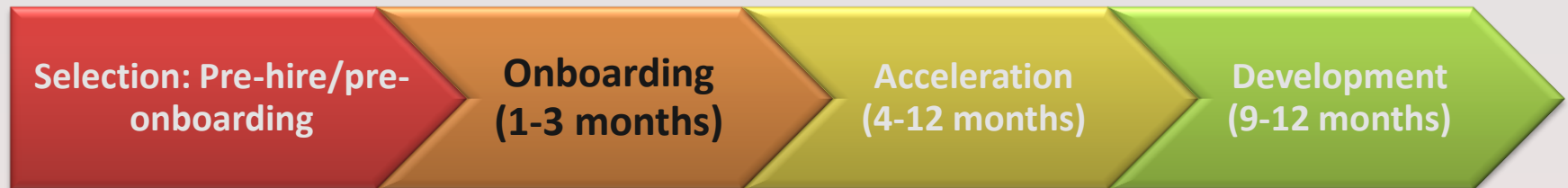
- Transform your leaders from ordinary to extraordinary
- Become your trusted leadership advisor

- **McKinsey & Co. found that 40% of corporate officers in 77 companies said they can't pursue business opportunities because they lack the right leadership**
- **Harvard Business School reported a 40% to 60% failure rate of U.S. executives**
- **In a U.S. Conference Board report, only 36% of employees rated their companies' leadership as good or excellent**
- **Corporate Executive Board Recruiting Roundtable survey found 89% of new U.S. executive hires indicated they did not have the optimum level of knowledge and skills to do their job**
- **Right Management Consultants' report indicated about 30% of new managers and executives fail at their new jobs and leave within 18 months**

Defined as:

- Systematic process to integrate leaders into the organization, culture, team, function and role (more powerful than the orientation process)
- Accommodating, assimilating and accelerating new executives
- Building effectiveness and impact as quickly as possible

Onboarding Framework



Objectives: What you want to accomplish in terms of the people, role, stakeholders, operations, etc. over the first 90 days

Look at the first 90 days (after leader is hired) as having 3 phases that overlap:

Discovery

- Phase 1
- Focuses on accelerated learning & establishing relationships with key stakeholders (Days 0-15)

Diagnosis

- Phase 2
- Analysis and review of all information required to build the revised strategy, plan, structure, culture, operations, etc. (Days 16-65)

Direction

- Phase 3
- Preliminary conclusions about strategy, structure, people, financials, etc. Establish goals & action plans. Communicate & implement plans. (Days 66-90)

All of these elements are in process at the same time. Follow these “best practices” to achieve.



Discovery Phase

The first step is to establish the objectives to accomplish in the first 90 days in the following areas:

- **Promote Yourself**
- **Accelerate Your Learning**
- **Match Strategy to Situation**
- **Secure Early Wins**
- **Negotiate Success**
- **Achieve Alignment**
- **Build Your Team**
- **Create Coalitions**
- **Keep Your Balance**
- **Expedite Everyone**

Michael Watkins, First 90 Days

90 Day Objectives: Sample Plan for EVP


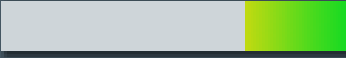



- Craft and deliver key messages
- Clarify roles and expectations with key internal and external stakeholders
- Promote myself: understand strengths and development needs for new role, incorporating learning from Hogan Potential and Challenge profiles
- Develop and launch process for development of AR strategic plan with AR leaders and other key stakeholders
- Understand and influence 2010 budget
- Participate in and influence the company's re-alignment
- Assess “organizational shaping” needs (strategy/structure/people/culture/processes)
- Outline preliminary new structure for AR and assess internal candidates (or gaps) for key leadership positions

Discovery and Diagnosis Phases

Another best practice is to help the new leader identify his/her strengths and weaknesses (blind spots and derailers) by using a variety of assessments. Leaders have found the Hogan assessment family very helpful for their own self awareness:

- Challenge Report – 11 potential derailers
- Potential Report – Leadership style
- Values Report – Type of culture created and liked

SELF ASSESSMENT

Susceptible – piling on, rushing too soon, critical, etc.	
Motivating others	
Problem-solving and decision-making	
Stress tolerance and triggers	
Communications preferences, style, and delivery	

Discovery Phase

- **New leader conveys expectations and direction**
- **Address surface issues that would fester over time**
- **Accelerate the relationship with the team**
- **Build the team culture**
- **Discuss key business and team issues**

One of the most critical elements for new leaders is to build the trust and gain support of their teams. This team assimilation process is often used as a way for the leader to set expectations for their team, address key issues, and respond to tough questions anonymously. A coach interviews the team with pre-determined questions, collects the answers and reviews them with the leader prior to the team assimilation meeting. Best to complete this during the first 2-3 weeks.

Sample Team Questions

- What do you know about (New Leader) already?
- What don't you know about (New Leader) but would like to know?
- What should (New Leader) know about the team's skills, experience, and dynamics?
- What concerns do you have about (New Leader) taking the role? Concerns about what he/she might do?

Sample Leader Questions

- What are your hot buttons?
- What are your priorities and goals for the team?
- What are things at the Company that should be changed?
- How do you describe your management style?

Discovery Phase

Another best practice is to accelerate the development of a strong working relationship with the new leader's boss by working with a coach to facilitate the discussion.

- **Accelerate the development of the new leader and their Manager's relationship**
- **Provide efficient platform for sharing of expectations**
- **Establish a coaching relationship**

Sample Boss Questions

- **What's the best way to get started in this relationship building process?**
- **Your preferences in having great working relationships?**
- **Based on the Hogan feedback, what do each of you bring to the relationships as strengths?**
- **What areas do you need to help each out with?**
- **Expectations for the role from your perspectives.**
- **Initial impressions of the key challenges.**
- **Next Steps**

Discovery Phase

Another best practice is to help new leaders focus their time and attention on the stakeholders that matter the most. Use this simple tool to help new leaders sort out who has the most importance. With limited time the new leader wants to develop relationships and align stakeholders to their plans.

Stakeholder Name	Technical	Success Network	Influence	Total	Action Plan for Obtaining Support
1)					
2)					
3)	Instructions for Exercise 1. Identify your top 9-10 key stakeholders. 2. Determine degree of technical, support, and influence using the scale of 1 – 10 with 1= low and 10 = high.				
4)					
5)					
6)					

Diagnosis and Direction Phases

One of the core areas during the 90 days is to come out of this initial period of time with the direction to take going forward. Use a SWOT analysis to help determine their strategy and direction.

INTERNAL	
Strengths	Weaknesses
<p>Determine what the company does really well internally versus the competition.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> • Lots of experience • Technical knowledge • High employee engagement • Quality brand name • Market leader • Reputation 	<p>Determine what the company does poorly internally versus the competition.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> • Process controls and standards • Building, infrastructure, and IT • Open manager positions and first-level needs development • Internal reputation – Difficult to work with, resistant to change, complacent • High costs vs. competition
EXTERNAL	
Opportunities	Threats
<p>Determine what is external that can be turned into business.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> • Export/import growth • Identify new products/markets– expand portfolio • Acquisitions • Provider of solutions/systems to solve customer's problem • Strategic alliances/partnerships with suppliers 	<p>Determine what is external that can be turned into business.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> • Incoming companies to the local area • Management turnover • Imports • Raw materials shortages • Succession planning - Pending retirements in the workforce

Direction Phase

During the first 90 days leaders are compelled to examine the direction of their organization, department, and function by developing a vision, mission and values statements. This drives alignment among the team and provides the organization the needed direction, priorities, and guiding principles for actions going forward.

Developing a Mission Statement

- Mission statement describes the overall purpose of the organization.
- Four questions your mission statement should answer:
 - What problem(s) do you solve? What need(s) do you fulfill?
 - What do you sell? How do you make your money? What is your revenue model?
 - How are you unique from everyone else out there? What is your unique selling proposition?
 - Who will you sell to? What is your target market?
- When wording the mission statement, consider the organization's products, services, markets, values, and concern for public image, and maybe priorities of activities for survival.
- Does the mission statement include sufficient description that the statement clearly separates the mission of the organization from other organizations?

Developing a Vision Statement

- The vision statement includes vivid description of where the organization will be in the future – 3-5 years out.
- The vision is a compelling description of the state and function of the organization once it had implemented the strategic plan

Developing a Values Statement

- Values represent the core priorities in the organization's culture, including what drives members' priorities and how they truly act in the organization. Values are increasingly important in strategic planning.
- Establish four to six core values from which the organization would like to operate. Consider values of customers, shareholders, employees and the community.

Best Practices by Phase

Bringing Leaders to the Next Level

Best Practice	Discovery	Diagnosis	Direction
90 Day Plan	X		
Assessments	X	X	
Team Assimilation	X		
Boss Assimilation	X		
Stakeholder Alignment	X		
SWOT		X	X
Vision, Mission, Values			X

Ask yourself these 3 questions

1. What improvements can you make to your current leader onboarding process?
2. What are the key barriers to success?
3. What 2-3 tangible steps can you take on the job?

The New Leader's 100-Day Action Plan: How to Take Charge, Build Your Team, and Get Immediate Results, by George Bradt, Jayme Check and Jorge Pedraza

The First 90 Days: Critical Success Strategies for New Leaders at All Levels, by Michael Watkins

You're In Charge, Now What?: The 8 Point Plan, by Thomas J. Neff and James M. Citrin

Your Next Move: The Leader's Guide to Navigating Major Career Transitions, by Michael Watkins

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CPS transforms teams, leaders and organizations by increasing operational efficiencies from 60% to 96%, improving employee engagement scores by up to 25%, and building leadership performance effectiveness by 36%. Our practical and customized solutions offer real results for a proven track record of success.