

A guide for executives and managers entering a new role

Although most managers and executives change jobs several times within their careers, many organizations do not provide good support for those leaving the old and entering the new. Given that first impressions are critical, and difficult to change later, you will need to plan your entry carefully if you are to make an excellent first impression. This guide will help you gather the information you need.



Step 1: Understand yourself

Ask yourself (and answer) the following questions:

- What was it like for you to change jobs in the past?
- What are some of your predictable ways of entering, testing, defending, reaching out, etc.?
- What are your feelings, beliefs, hopes, concerns and attitudes (positive and negative) about this change?
- What reputation or history do you bring with you?

Step 2: Understand the role

Do not assume that this new (branch, executive, president) job is just like any other (branch, executive, president) job. Make sure you understand your new position fully, and assess your match to the role. Consider the following:

- What is this job all about? What is its purpose and major accountability? To obtain this information,
 - read the position description
 - talk to your new manager (board, or other governing body)
 - (if possible) talk to the person you are replacing
 - talk to your new customers and other key stakeholders
- What competencies—cognitive capability, knowledge, skills, attitudes, behaviours—does this job require? If you can, ask others what they think.
- How does your background compare with your assessment of the requirements?
- What do you really value about this work that will keep you interested and committed?

Step 3: Understand your new manager

An important element of this change is the manager (or board, if you are a CEO) who is accountable for your work outputs. Be sure you can answer these questions:

- What are your manager's expectations, goals, highest hopes, worst fears, for the area you are going to lead?
- What are their perceptions of the area and its past performance?

Step 4: Understand your new team

- What do they perceive as the implications of the change in leadership for them?
- How can this transition be negative for them?
- How can it be an instrument for getting something they want?
- Is the organization or department in transition (for example, changing in purpose), or is this simply a change in leadership?

Step 5: Plan your entry

Use the following survey-feedback process to surface and circulate information.

1. Take stock of yourself, the role, and its environment as discussed above.
2. Meet with each of your direct reports individually during your first week on the job. Tell each person you are going to talk to everyone on your immediate team as well as some people external to the unit/organization, and will hold a group meeting afterwards to discuss the information

you have collected. Ask each direct report to describe his or her

- history with the unit/organization, experience of it, anticipations about the change.
- assessment of the strengths and areas for improvement in the unit's or organization's performance.
- perception of the unit's/organization's goals and priorities—what they are *and* what he or she believes they should be.
- own performance objectives, and how he or she is doing with them
- style of working (and managing, if in a managerial role).
- views on what the manager of this unit/organization must do to make it work best.
- views on how the group operates as a team.

Also provide information on yourself—your entry concerns and hopes, your history (if they don't know you), and the way you like to work.

During the interviews, be sure to take notes. It will help you remember everything and indicates to the other person that you are serious and you are listening.

3. Concurrently with your team member interviews, talk with as many people as you can outside your own unit's boundary—for example, your manager, people in other departments you will interface with, customers, other stakeholders and the person you are replacing (if this is possible). Get their views on your role and organization—its performance, strengths and weaknesses, opportunities, what you need to be doing and why.
4. Summarize the data you have collected. Turn it into a presentation using flipchart sheets, overheads—whatever suits your own style or your sense of the group's norms.
5. Call a team meeting. Make it for at least a full day, preferably in a different location to change their “set.”

6. Present and discuss the information:

- a) Feed back what you have learned—areas of agreement and disagreement, problems and opportunities, hopes and concerns, team issues, stakeholder views.
- b) Provide your own views on what you've heard and what you think needs to be done and how.
- c) Work with the group to reach consensus on goals and priorities and clarify what needs to be done to achieve them.
- d) Contract expectations with the group—what they need/want from you, what you need/want from them (individually and collectively), what they should count on from each other to ensure success as a team.

Note: If you cannot complete the above in one session, arrange to meet again within a day or two to finish this important entry groundwork.

7. Make a date for a team progress review meeting no more than two months out.

Some final points

- Don't forget to include your administrative support person in your interviews and the meetings.
- Consider using a facilitator for the initial team meetings—someone from your organization's human resource or organization development unit. If no such role exists, seek outside help.
- Always deal with the people and the unit (organization) simultaneously. That is, don't have one meeting about the people and another meeting about the unit. The two are interactive and interdependent. You will need to act on both together.

Try these behaviours and approaches, but *be yourself*. If you follow this guide, you will achieve a *positive primacy* with your team and organization. You will set the tone for future success, both in what is achieved and how it is accomplished.

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