Our Thinking Series:

5 Steps to Integrating a New Leader

by Michael Perrault

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Integrating new leaders can be a costly, stressful, and uncertain experience. Organization productivity often declines during a leadership transition. Decades of research and in-the-field experience indicate that there is a predictable cycle of activity associated with onboarding a new leader.

Given the costs and risks involved, savvy organizations should attempt to ensure that new leaders (whether internal or external hires) acclimate to their new position rapidly and effectively. The turmoil caused with transitioning leaders is manageable with the use of a proven solution that can be applied at all levels of an organization.

Obvious and Hidden Transition Costs

It can cost as much as 150 percent of the salary to replace a manager. When factoring indirect costs, this number is even larger. Obvious costs to hire a senior manager include recruiting firms, advertising and marketing, background checks, drug testing, relocation, and travel. Sign-on bonuses or employee referrals up the ante further. Less obvious costs include internal overhead for human resources and lost productivity for executives. Indirect costs include the loss of institutional knowledge and organizational focus.

There is increased risk when hiring a senior manager because the position comes with much responsibility; therefore, there's a greater potential for disastrous effects if it is the wrong choice. While firms do their best to ensure that candidates have the appropriate qualifications to fulfill those responsibilities, too often the wrong hire is made.

The Leader Transition Cycle

After the initial shock of a leadership change, people wonder, "How will this affect me?" "Who is this new leader?" "How will things change around here?" Employees question each other; rumors abound and productivity suffers as people speculate about the future. They try to learn how the new leader leads to determine what the future may hold.

The eustress that normally exists at work is refocused as distress between people and the future state. At these times, absenteeism rises and performance, productivity, and accountability suffer.

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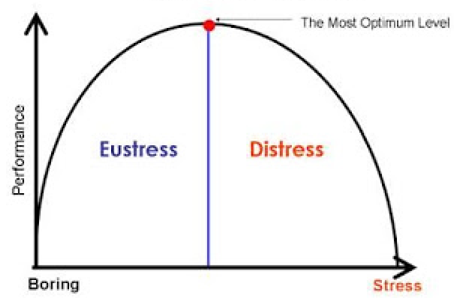

When the new leader arrives, productivity edges lower. Wanting to make a good first impression, people behave in a manner that they perceive to be their best, whether or not that differs from their normal on-the-job behavior. Intriguingly, these same pressures also affect the new leader's behavior. It can be as long as a year for the organization to rebound.

Shortening the Transition Cycle

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STEP 1: Introduce the Model

Typically, an external consulting firm assesses each member of the "new" team, interprets the findings, and facilitates the process. They first meet with incoming leaders to explain the transition process and goals. Incoming leaders are introduced to Facet5 and complete the online questionnaire.

The purpose of the transition session is to address employee concerns and focus on the future, the team's real work. Leaders are informed that they may be asked some tough questions about themselves. They are encouraged to answer as many as they feel comfortable answering, reserving the right to not address every issue raised.

STEP 2: Assessment

Facet5 is based on the Big five model of personality. It is the assessment tool of choice used by many consulting firms. Developed specifically for the workplace, it provides useful information regarding ways to be more effective at work. The language used is simple and free of psychological jargon.

The team completes the 20-minute online Facet5 assessment. Afterward, the consultancy meets with each team member individually. "During the interview we provide them with their individualized Facet5 report and review it with them to ensure understanding. We ask questions to help gain their perspective on the issues facing the incoming leader. We summarize their comments and combine them with the others so their privacy is maintained," explains Debora Wolf, a certified practitioner with the Perrault Consulting Group.

Examples of questions employees want answers to are:
Who is this new person? How diplomatic is she?
What is going to happen to my current role?
Will my job be seen as important?
Will she mind if I drop by her office unannounced?
How will she judge my productivity?

STEP 3: Leader Feedback

The consultant then meets with the incoming leader to review her Facet5 report and to discuss the issues identified by other team members. By this time, most new leaders will have already started to form impressions of the team they are inheriting. Often new leaders will have heard what challenges currently face the team and has likely received guidance regarding where to focus their immediate attention.

This discussion helps the new leaders quickly compare their preconceived views with those of the team. With this knowledge in hand, leaders can begin to plan for moving forward with a much clearer idea of the challenges that lie ahead.

STEP 4: Meeting the Team

Facet5 also produces a summary of results called TeamScape; a copy of which is emailed to each team member. The team meeting is held soon after the new leader's first day on the job. The entire team should attend to maximize the effectiveness of the onboarding program.

The meeting opens with a quick review of the Facet5 model to ensure familiarity with the TeamScape profile. The profile provides a simple and precise method to assess the predicted strengths and issues confronting the team. It demonstrates team dynamics powerfully and succinctly, clearly showing the culture of the team, how relationships are likely to work, and how work will be managed and delivered.

Facet5 Profiles of Team Members

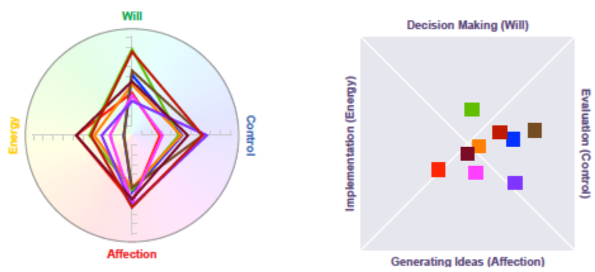

Figure 2, "Profiles of Team Members," illustrates that this team is likely to be quite social and altruistic (see affection scores) and that they are likely to enjoy brainstorming solutions. Also, the data suggest that they will then devote much time and mental energy evaluating which of those solutions offers the best chance of success (see control scores).

We also can speculate that they may have a difficult time making decisions (only one team member appears to be a strong decision maker). And, they may lose interest in their implementation plan (no boxes in the Implementation triangle). Armed with this knowledge, the team leader can assign specific roles to select individuals to help cover under-represented areas of the problem-solving model.

The assessment also uses the Thomas Kilman Conflict Model to predict how members will deal with issues. With this model, the facilitator usually observes an animated discussion as people agree or disagree with the findings. This gives members a clearer view as to how the new leader is likely to deal with disagreements. Being prepared in advance to manage differences, the team is more likely to effectively manage conflict.

Attention moves to building the team strengths and challenges document. In preparation for the meeting, team members are asked to prepare a collection of memorable feedback they've received regarding things that they do well (the Facet5 assessment, annual performance reviews, or work history feedback).

They also are asked to identify behaviors that others may have found troubling. These are labeled, "Challenges you may have working with me." Again, these should be consistent messages received over time. Lastly, the new leader is asked to describe how his teammates can help him be more effective. They are asked to share these publicly.

People are encouraged to add to each person's list of strengths and challenges to stimulate self-assessment and facilitate team interaction. Often anticipated with some trepidation, this activity opens communication channels and increases levels of trust. This is compiled in a document to be shared with all.

STEP 5: Follow Up

The new leader is advised to hold a follow-up meeting 90 days after the initial get-together at which the strengths and challenges document is reviewed and updated. Emphasis is placed on using the document as a process intended to keep the team focused on work while building trust. Revisiting the document seems to encourage people to develop more effective behaviors.

The onboarding process integrates leaders more rapidly and stimulates team functioning and productivity. It gives all a better understanding of their leader and how they will work together. The leader learns the strengths of the team, and areas for development.

Additionally, they have a common language to better understand each other's preferences and style. This provides a foundation for giving and receiving feedback and for resolving issues effectively—the common denominators of high-performing teams.

Clients report that they operate more effectively six months after the transition than organizations that do not. Feedback from leaders confirms that the transition process meaningfully improves their knowledge of the organization and their understanding of the new team, and allows them to become a fully contributing member more quickly.

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