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The New Leader Integration Process

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A previous article introduced my new book on executive transitions, *Before Onboarding: How to Integrate New Leaders for Quick and Sustained Results*. This book outlines a facilitator-led process that ensures new leaders arrive on their first day fully equipped to get the right results quickly and avoid potentially career-ending mistakes. It's designed to curtail the alarming failure rates of senior executives entering existing organizations by detailing the steps taken in a multi-phase, facilitator-led process. The phases of this approach are:



- Facilitator entry
- Interviews with boss, peers, direct reports and other key stakeholders
- Documentation of the information gathered
- Sharing this information with the incoming leader and debriefing the material
- Facilitating a kick-off meeting on the first day with the new leader and direct reports
- Follow-up with the new leader and his or her boss over the first 90 days

The book elaborates on 53 questions to be asked during this "pre-boarding" process. Several of them are overlapping to ensure that multiple perspectives are captured. All but one of the answers is directly attributable to the respondent. This helps the new leader know where there is agreement with the boss' input or divergent opinions. The new leader enters the job with talking points and "hot buttons" available for use during initial meetings with the organization's key stakeholders. Landmines to avoid are also clearly made evident in this process.

A sample of questions asked of the new leader's boss:

- *"What worked well for the new leader's predecessor (and not so well)?"*
- *"What types of issues and decisions require consultation with you in advance?"*
- *"What specific projects need attention in the first 30, 60 and 90 days?"*

A sample of questions asked of the new leader's peer group:

- *"What does the new leader need to do to ensure your own continued effectiveness?"*
- *"What do you want the new leader to continue doing (and avoid doing) that the predecessor did?"*
- *"What type of executive does and does not fit in well in this organization?"*

A sample of questions asked of the new leader's direct reports:

- *"How do your customers (internal and external) view your organization (department, division, etc)?"*
- *"What are the short-term opportunities that could improve the department's overall performance?"*
- *"What would you like to see the new leader do that the previous leader did not do?"*

Reviewers of this book consistently support the concept of a facilitator-led executive integration process, especially in light of the fact that so few organizations address new leader integration at all and, instead, are leaving their new leaders' success up to chance. With failure rates of senior executive hires

approaching fifty percent, organizations can no longer afford to neglect this vital area. For equally important reasons, until such time as organizations begin to adopt new leader integration processes like the one outlined in this book, executives who are interviewing for new positions would benefit from selecting some key questions from it to ask during the interview process.