Leader Transition Success Formula

Fast Track Your Entry into a New Role

the HAP group

Tapping into Your Full Potential

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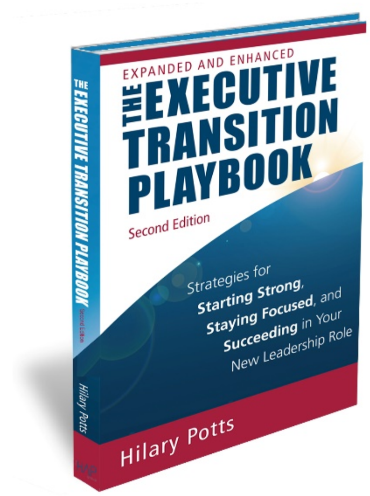
Hello and Congratulations!

Whether you were just promoted, entering a new role, or taking on additional responsibilities in your current job, most leaders want to find the easiest and fastest path to transitioning into the new assignment. The key is to find your approach to positively serving the organization.



After decades of working with thousands of leaders across many geographies and industries, I have identified a five-step process that helps leaders avoid any missteps and helps them accelerate their onboarding into a new role. As a result, leaders can quickly learn about the business, develop key relationships, and make early and impactful contributions to the business.

The Leader Transition Success Formula Guide summarizes the first two steps to creating what I call an Executive Transition Playbook.

I've included an easy-to-use process to help get you started and make the most of this guide. I recommend printing out this document and going through each exercise.

For more information on creating your Executive Transition Playbook check out my newly expanded second edition of *The Executive Transition Playbook: Strategies for Starting Strong, Staying Focused, and Succeeding in a New Leadership Role* available on Amazon.com.

You can also find additional information and ideas about leading yourself and others through transitions and change on www.hapgrp.com.

To your success!

Hilary Potts

The HAP Group, LLC

Taking Charge of Your Transition

Let's face it: expectations are high, and businesses can't afford for you to fail.

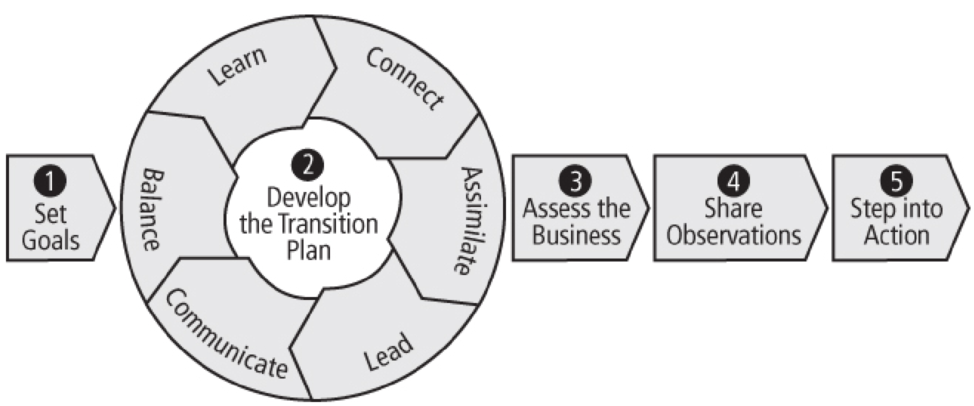
While company leaders may tell the incoming leader to take time to transition, often, their actions push the new leader to address issues well before the new leader has a firm understanding of the situation. Unfortunately, studies over several decades continue to show that an estimated 40 percent of executives entering new roles fail in the first two years. The bottom line is that many leaders jump into a new position without a plan, and those who create a plan abandon it a few weeks into the assignment.

I created The Executive Transition Playbook to guide leaders through the first 100 days and beyond. The Transition Playbook takes a strategic approach to prioritize and sequence a series of interactions so that you can move swiftly to take responsibility for the business. The Executive Transition Playbook goes beyond the typical onboarding and orientation processes to help leaders focus on their business area and attend to the often-missed interpersonal aspects critical to cultivating trusting relationships.

By creating and implementing an Executive Transition Playbook, you can:

- Fast track entry into a new role
- Objectively learn about and assess the business environment
- Create trusting relationships
- Make conscious decisions on how to lead the new organization
- Stay at peak performance throughout the transition period

The Executive Transition Playbook presents five steps to act as a blueprint to guide you through the transition. I strongly suggest you put your ideas on paper. The five steps outlined in the figure below include Set Goals, Develop the Transition Plan, Assess the Business, Share Observations, and Step into Action. Within Step 2: Develop the Transition Plan are six key ingredients; Lead, Connect, Learn, Balance, Communicate, Assimilate.



The development of an Executive Transition Playbook is an iterative process. The worksheets on the following pages provide a framework to think and strategize about what's essential in this new role. By putting the transition plans on paper, you get organized and see what may be missing. In addition, putting your transition strategy and plans in one place enables you to review and refine your plans to make the first 100 days work for you.

Step 1: Transition Goals and Strategy

It's vital to set your transition goals to focus on what matters instead of getting pulled into topics that may not need your attention. Transition goals provide you with targets regarding how well you are getting to know the business, the people, the customers, and the processes.

To get started, use the following worksheet to identify your transition goals and strategy.

Ask yourself:

- What is the business situation I am entering?
- What are my personal and professional goals for this transition? What do I wish to accomplish in the first 100 days?
- What is my leader transition strategy?
- How will you define a successful transition into the role?

Refer to your transition goals and strategy throughout your transition to remind yourself what matters and ensure you stay on track.

Leader Transition Goals and Strategy

The Situation
What do you know about the business and situation you are inheriting?

Transition Goals	
Personal Goals	Business Goals

Leader Transition Strategy
Describe how you will approach this new role

Connect and Build Relationships
Identify individuals and groups to get to know during your transition

Define Your Transition Success	
After the first three months, people will be saying:	I will know my transition is successful if:

Step 2: Develop Your Playbook

The second step in the Executive Transition Playbook is to create a transition plan using the six components: Lead, Connect, Learn, Balance, Communicate, and Assimilate. The Playbook provides the structure and flexibility to develop a customized transition plan to meet your transition goals and assess the business situation.

With the information in one place, it is easier to look at scenarios and see the business interdependencies to make fact-based conclusions. In addition, the time you spend thinking aids in prioritizing and adjusting your transition activities.

Use the six components to develop your Leader Transition Playbook.

LEAD: Enhance Your Leadership Approach

Entering a new role isn't the time to get complacent or assume your current approach will fit the new position. Your words and actions impact what others say and do.

It's easy to fall into leadership approaches that worked in the past; however, these behaviors may not be appropriate in the new role. Every step into more senior positions requires new leadership actions and approaches. Therefore, a job transition is a good time to assess your leadership and make the necessary enhancements.

Use tools such as a Personal SWOT Analysis to assess your strengths and weaknesses, as well as potential threats and opportunities for development.

- What are your strengths?
- What are your weaknesses as a leader?
- What are the opportunities for personal growth and development?
- What obstacles will challenge, even threaten your ability to perform in this role? Could any of your strengths or weaknesses lead to potential threats?

Critically examine your new role, the business situation, and the necessary skills needed to be successful. With this knowledge, create a "Leadership Plan" to complement your leadership behaviors with the business situation. Ask yourself:

- What leadership behaviors do I need to start doing?
- What behaviors or actions no longer serve me in this new role?
- What should I continue doing as I move into this new role?

As you start new behaviors, it's essential to let go of others. Be sure to capture these behaviors as a reminder of what to do and what not to do. On the following page is the "Leadership Planning Worksheet."

Leadership Planning Worksheet

<table>
<tr><th colspan="6">What is Expected from Me in This Role?</th></tr>
<tr><td colspan="6"></td></tr>
<tr><th colspan="6">Personal SWOT Analysis</th></tr>
<tr><th colspan="3">My Leadership Strengths</th><th colspan="3">My Leadership Weaknesses</th></tr>
<tr><td colspan="3"></td><td colspan="3"></td></tr>
<tr><th colspan="3">Opportunities for Improvement</th><th colspan="3">Threats and Vulnerabilities</th></tr>
<tr><td colspan="3"></td><td colspan="3"></td></tr>
<tr><th colspan="6">Leadership Behaviors to:</th></tr>
<tr><th colspan="2">Continue Doing</th><th colspan="2">Start Doing</th><th colspan="2">Stop Doing</th></tr>
<tr><td colspan="2"></td><td colspan="2"></td><td colspan="2"></td></tr>
<tr><th colspan="6">My Leadership Actions</th></tr>
<tr><td colspan="6"></td></tr>
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CONNECT: Build Strong Relationships

Making Great First Impressions by Articulating Your Value

It's true! People will be quick to assess you by the first impressions you make. In your first interactions, people will be determining how easy or difficult it is to work with you, whether they can relate to you, and if they want to follow your lead. Even if you have been working with these colleagues, they will be curious about how you will approach your new role.

You will want to talk about yourself with confidence and ease by creating a dialogue to get to know your colleagues versus a monologue talking solely about yourself. When colleagues are clear about what you bring to the role, it's easier to work with you. Knowing what you want to say ahead of time also allows for more meaningful conversations. Keep your messages short and simple and stick to relevant aspects to build credibility and respect.

Here are a few things to help you prepare to talk about yourself.

Professional and Personal Background: People will be curious about who you are and why you were chosen for the role. Your background gives people some context and acts as a good conversation starter. Capture the nuggets that will help people get to know you. Be sure to include stories about what you like to do when you aren't at work.

Leadership Values: Present your leadership approach is through sharing examples and stories about what you value. Then back up your conversations by walking your talk. Finally, choose three to five values that demonstrate your approach to leadership.

Personal Branding Statement: A Personal Branding Statement, some call it a Value Proposition, is a sentence or two about you and what makes you unique. Take care that this isn't a regurgitation of your resume or your life story. Yes, I have heard seasoned executives go on and on regaling their life stories leaving little time for anything else.

Core Messages: You may have specific business models or approaches that will be important to you. Help coworkers learn what matters and how you approach business.

Share Your Stories: Pull together the relevant stories and messages you want to share with others to build the foundation for leading the area.

Mutual Expectations — I have noticed business relationships stumble because there weren't clearly defined expectations. During your initial discussions, set mutual expectations for how you will work with others. A good practice is to focus on setting mutual expectations for the first 90-100 days and re-adjust and recommit to expectations at the end of your transition. Use the "Personal Branding Outline" worksheet to prepare to talk about yourself.

Personal Brand Outline

My Business Background	My Personal/Family Interests and Hobbies
My Leadership Values	
Personal Brand Statement (Value Proposition) One to two sentences to describe the unique value you will bring to work.	
My Core Messages and Guiding Principles	
Stories to Link Experiences, Values, and Leadership Style	
Set Mutual Expectations	
What You Can Expect from Me	What I Expect of You/ How You Can Help Me

Get Relationships Off to the Right Start

Better conversations aid to quickly build credibility, trust, and respect, which lead to better business decisions.

Too often, I see leaders "wing" conversations and lose the opportunity for richer, more in-depth discussions with colleagues. In today's world, where people aren't easily accessible, preparation and well-crafted messages aid in better conversations.

For each interaction, my clients think through how to approach the conversations and follow-up touchpoints to build a level of rapport and trust rapidly. The "Stakeholder Conversation Preparation Plan" provides a simple way to prepare what you wish to discuss and consider how people will react. When you understand how people respond, you can tailor your conversations to gain agreement and acceptance, leading to effective actions.

Do your homework using the following steps to cultivate better relationships:

- **Identify Your Stakeholders:** Know your audience by researching the people, their backgrounds, and interests.
- **Topics & Messages:** Know what you wish to discuss ahead of time and craft your talking points.
- **Reactions & Concerns:** Be prepared to handle the interpersonal and emotional aspects of conversations. How will people react to what is going on around them? Consider how they will respond to your comments about critical issues. What can you do and say that would help them accept the changes and move forward?
- **Questions:** Make good use of the brief time with well-thought-out questions. Also, be prepared to answer the more delicate questions people may ask. This preparation will help you be more effective and efficient with your time.
- **Follow-up Actions:** One conversation is a terrific first step, but it's typically not enough to develop a working relationship. What kind of follow-up actions will help to build credibility and advance the discussions?

The "Stakeholder Conversation Preparation Plan" provides a structure to prepare for the many conversations, so you can quickly build credibility, trust, and respect which is important to make sound business decisions.

Stakeholder Conversation Preparation Plan

Individual	Topics / Messages	Stakeholder Reactions / Concerns	Questions	Follow-up Actions

LEARN: Create a Learning Environment

Leaders starting a new role can be so anxious to get going that they miss opportunities to gather information about the business. Whether you are new to the company or business or promoted from within, there is always something to learn.

Go broad and deep in reviewing all aspects of the business. Explore the business from different vantage points—the enterprise, divisional, regional, or country level. Go beyond your area and look cross-organizationally to pick up information about how the business operates.

Before jumping to conclusions, listen to all sides of a topic. The first 90-100 days give you the unique opportunity to do a full review, which you may not have the luxury or time to do later.

These areas, when missed, can cause challenges down the road. In the early days of a new role, you have permission to get into the details, ask stupid questions and explore how the business operates.

I advise clients to talk less and observe more. It's easy to get caught up on the technical aspects and fail to see the emotional and social aspects of how work gets done. The "softer" aspects of the business can be the more challenging areas to navigate, especially when leading changes in the future.

The "Learning Plan and Business Review" is a handy way to capture all the relevant topics and the individuals who can help you with your learning. Notice if there are topics you gloss over. These could be areas that you need to learn more about despite your disinterest.

Your "Stakeholder Conversation Preparation" sheet is an excellent place to reference some of the topics and questions to prepare for your discussions.

Learning Plan and Business Review

Topic/Business Element	Specific Learning Areas	Who Can Help?	Timing?	Status/Notes

BALANCE: Healthy Practices for Peak Performance

Times of transition can be hectic and stressful as leaders move out of their comfort zones. Stepping into a new role and plowing through really isn't a wise option. The new position requires stamina and energy to get up to speed.

Below are ten Healthy Daily Practices to keep you physically, mentally, and emotionally ready to take on this new role.

1. Exercise at least 20-30 minutes a day
2. Get up early and plan your day
3. Eat healthy foods
4. Stay hydrated
5. Sleep at least 7-9 hours per night
6. Regain balance through deep breathing
7. Show gratitude and provide positive feedback to others
8. Find a few minutes of silence and quiet time
9. Capture your thoughts and ideas in a journal
10. Take regular breaks from electronic devices

ACTION: Identify a few Healthy Daily Practices you will incorporate into your transition to keep you working at peak performance. Also, be sure to schedule time in your calendar or business diary with personal commitments to avoid missing out on important personal and business events.

COMMUNICATE: Be Visible and Engaged

Leadership is all about communication. People will want to know where they stand, what is expected of them, and what happens next. It is at the core of all we do.

Staying in touch becomes a pivotal element to focusing and engaging others. Often leaders think they are communicating enough—though a common complaint is that leaders *don't* communicate enough. It can take an organization time to hear and process the message. However, consistent, well-thought-out communication keeps everyone moving in the same direction.

Your new role signifies a change, and people will be uncertain about what this means to them. Communicating "nothing" is communicating something. When smart people lack communication, they chart their course, while others make up their own stories, which are often wrong. Without proper communication, people lack clarity, and productivity suffers. Usually, this means communicating the same message many times.

Create a "Leader Transition Communication Plan" to communicate with others, and don't be shy to communicate the same message several times. Your leader communication plan should include a communications strategy, a set of communication principles, vehicles for communications, key messages and topics, and a timeline.

Leader Transition Communication Plan

My Communication Strategy	
Principles to Guide My Communications	
Forums and Communication Vehicles	
Key Messages	

Communication Calendar (30-60-90 Days)

0-30 Days	31-60 Days	61-100 Days	Beyond

ASSIMILATE: Understand the Ways of Working

Every organization has a culture. Entering a new company or business department can be a culture shock. Getting used to cultural norms can take some time. Learn about the cultural aspects of the organization. This knowledge allows you to know where, when, and how to make adjustments that the entire team can own.

As you move through your transition, take time to reflect on what you are noticing in how work gets accomplished. Start by understanding the current culture before you jump in to make changes.

To help in your assimilation, I recommend new leaders schedule an Assimilation Work Session with their team. In *The Executive Transition Playbook*, I outline the details of an example work session.

Getting Started: Pre-Day One Checklist

Get organized and started well before your first day in the new role. I suggest developing your Transition Playbook before day one. Below is a checklist of actions you can take to jump-start your transition and be ready for your first day on the job:

- ☐ Complete the previous assignment — leave it better than you found it
- ☐ Find out everything you can about the company and the business — begin capturing questions, and topics to review when you are in the role
- ☐ Prepare to talk about yourself, who you are, and how you can add value
- ☐ Seek advice and rally key resources that can support your entry
- ☐ Start developing your Transition Playbook, including goal setting, calendar blocking, and the six key ingredients in the Transition Plan
- ☐ Incorporate Healthy Daily Practices into your routine before you start the role
- ☐ Assess your leadership strengths and weaknesses and determine how you will approach the new role
- ☐ Map out your approach to learning and assessing the business
- ☐ Develop a list of key stakeholders you will want to meet
- ☐ Map out your Communication Strategy

To your success!

I wish you the best in your new role and hope these practical ideas and tools help you with your transition.

For more information and ideas, order your copy of *The Executive Transition Playbook: Strategies for Starting Strong, Staying Focused, and Succeeding in a New Leadership Role* on Amazon.com.

About Hilary Potts

Hilary Potts, the founder of The HAP Group, is a change leadership strategist who advises executives in some of the world's most prominent organizations to map out strategies to lead and execute business transformations successfully.

Her work is built on a solid foundation of practical business experience, extensive consulting and coaching expertise, and transformational practices.

With over three decades of experience in leading and advising organizations, Hilary knows firsthand the importance of creating and implementing strategies to develop leaders and grow healthy companies. She has worked with thousands of leaders worldwide, implementing powerful principles and practices for achieving smarter, smoother transitions that drive business results.

Hilary Potts is no stranger to leading and transforming businesses. Before founding The HAP Group, she served as President and CEO of a global leader in performance-based consulting. In addition, she spent the first 15 years of her career at a Fortune 500 chemical company, where she served in various business management positions.

Hilary is the author of several leadership books, including *The Executive Transition Playbook, Change Up: How Top Executives Lead Change and Deliver Results,* and *The Truth About Change,* all available on Amazon.com. For more details on how you can book Hilary Potts for consulting and coaching engagements as well as speaking events, visit her website: [www.HilaryPotts.com.](http://www.HilaryPotts.com)