

# NEW LEADER ASSIMILATION PROCESS: ACCELERATING NEW ROLE-RELATED TRANSITIONS

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Movement into a new leadership role is often very challenging and stressful. Such transitions are periods of vulnerability and opportunity. Failure to adapt and perform effectively and quickly in the new role can be costly both to the individual and to the organization. As the volume and frequency of executive movement into different roles increase, aiding this role transition process represents a new professional practice opportunity for consulting psychologists. This article describes a structured intervention designed to facilitate and accelerate this transition and assimilation process effectively by proactively addressing common leadership role-related transition issues. The intervention's business rationale, theoretical foundations, desired outcomes, key design features, and methodology are discussed. In addition, key issues requiring management for successful intervention conduct are examined.

*Keywords:* leader role transitions, on-boarding process, career transitions, role transition acceleration

Organizations continue to reconfigure and realign themselves in their search for increased operating efficiencies, improved performance, and competitive advantage. Management restructurings, consolidations of operating units, and mergers and acquisitions have become common occurrences. Each of these organizational changes generates movement of executives and managers to new roles and assignments. The current economic downturn has spurred massive reductions in force as organizations across industries adapt to slower business conditions. Such reductions often require executives and managers who retain their employment to move into new or expanded roles. In my own consulting practice, I have witnessed several senior executive clients have their span of accountability increased as they assume leadership over new departments and operations to compensate for the layoffs or forced early retirements of colleagues. Some research has found that

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*Editor's Note.* This article was submitted to the journal and initially reviewed at a time when the journal's editor was not employed by the author's university.—RLL

The author thanks Rodney L. Lowman, Jay Finkelman, and two anonymous reviewers for their useful feedback and comments, which contributed to the preparation of this article.

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downsizing and management restructurings often lead to increased subsequent voluntary turnover in survivors (Batt, Colvin, & Keefe, 2002; Trevor & Nyberg, 2008). Even during challenging economic periods, companies continue to pursue acquisitions as evidenced by the recent high-profile purchases of Merrill Lynch by Bank of America, Wachovia Bank by Wells Fargo, and Wyeth by Pfizer. Integration activities that follow such acquisitions inevitably spur migration of leaders into new or different roles. In addition, many companies intentionally move identified “up and comer” leaders across different business units and functions to help prepare them for future general management roles. Nalbantian and Guzzo (2009) suggest that such rotational assignments offer considerable potential value as a leadership development strategy if done properly. And of course there are the ongoing normal processes of promotion. By all indications, the rate of executive transitions from one organization to another and the frequency of executive movement within a given organization from one role to another are at all-time highs (Institute of Executive Development & Alexcel Group, 2007). Executives report such role transitions as being one of the most challenging and stressful life events they experience, second only to divorce and slightly more than the onset of health-related problems (Paese & Mitchell, 2007). The pressure appears to be increasing for new leaders to “hit the ground running” when assuming a new role. An increasing number of my executive clients report that the traditional 3- to 4-month “honeymoon period” during which they were given some time to adapt to a new role is shrinking dramatically. They are expected by their bosses and other stakeholders to “get up to speed” and deliver results in a much shorter period of time. Assisting executives and managers to transition and assimilate quickly and effectively to new roles and assignments offers a new emerging professional practice opportunity for consulting psychologists.

The costs associated with executive or senior leadership role transitions can be significant. Smart (1999) estimated the cost of a failed hire to be 24 times base compensation. These go beyond the direct costs associated with recruiting and selecting the new executive, replacing the role incumbent, or even disrupting supplier or customer relationships. There are also substantive costs associated with the time it takes a new leader to become highly productive in a new role. Even the most accomplished executive requires some time to assimilate into a new role and begin generating expected results. Ninety-two percent of externally hired executives and 72% of internal transfers reported that it took them at least 90 days to reach moderately high levels of productivity following a new role transition. Sixty-two percent of external hires and 25% of internals indicated that it took them more than 6 months to become comfortable in the new role and “get up to speed” (Institute of Executive Development & Alexcel Group, 2007). A recent internal study conducted by the executive search firm Heidrick & Struggles of 20,000 of its own executive placements found that over 40% of senior-level executives were pushed out, failed, or quit within the first 18 months in the new role (Masters, 2009). A. Fisher (2005) cited a study by Right Management Consultants based on reports from their executive coaches spanning a 12-year period that showed that over one in three managers “washed out” within a similar period of time after entering a new role.

Watkins (2003) and Bradt, Check, and Pedraza (2009) have suggested that such failures are linked to errors made during the first 90 to 100 days in the new role. Some of these errors include acting too quickly with limited information, failure to build relationships and credibility with key stakeholders, and not securing a few “early wins” to lay the foundation for future success. Watkins also reported survey findings that indicated that the arrival of a new midlevel manager tended to have a negative performance impact on an average of 12.4 people. These included direct reports, bosses, and peers. He termed this the *impact network* of a transitioning manager. As a result, helping leaders manage the critical passage into a new role effectively so they can achieve high performance levels faster has considerable bottom-line implications (Dotich, Noel, & Walker, 2004). The old “sink or swim” mentality has just too many costs associated with it.

Although many organizations provide some degree of “on-boarding” support for new leaders, most of these approaches tend to focus on the basics like the company’s vision, strategic priorities, relevant operating policies, the new compensation and benefits package, and of course how to operate e-mail and voicemail. Often external hires also receive some cursory orientation to the company culture. However, such company-sponsored programs do not help the new leader fully

grasp the specific challenges and unique complexity of demands associated with the new role being entered, learn the dynamics of the new direct report team inherited, or help forge the new working relationships with members of that new direct report team. In addition, there seems to be little recognition that effective leadership transitions also require some degree of adaptation and accommodation by those who now have a new boss.

This seemingly unending trend of leadership movement and the attendant role transitions offer a unique new opportunity for consulting psychologists to diversify their professional practices. For more than 2 decades, both as an external and internal consultant, I have focused part of my professional practice in the leadership development arena. Besides designing and implementing enterprise-wide leadership development approaches, I have coached executives to help prepare them for seeking a promotion or lateral move designed to advance their career. I have coached numerous executives who experienced performance issues subsequent to transitioning to a new role, or who were viewed as “high potential” in a current role but needed help smoothing off some “rough edges” around their leadership style before they could be considered for advancement. Yet, it was not until a former executive client of mine sought my assistance to help her transition into a new leadership role in a new company that I realized the new consulting opportunity this offered. From that point on, I have integrated this type of transition assistance into my consulting services portfolio. I have refined the intervention described in this article over more than 15 years as I applied it across a variety of different role transitions and organizational settings. Regardless of the nature of the role transition, effective and rapid assimilation to the new role, its nuanced context, associated challenges, and initiation of the building of new effective work relationships are essential for success. Consulting psychologists possess the distinct capabilities to offer valuable assistance in helping this assimilation occur smoothly. Unfortunately, there is minimal literature available that specifically discusses the transition and assimilation process of leaders to new roles and how to facilitate it effectively. In the next few paragraphs, I review some related literature that forms the theoretical foundations for the intervention to be described.

### Relevant Literature

The literature on newcomer socialization and adjustment does offer some useful insight into the new role transition and assimilation process. Research has confirmed consistently that newcomers have a strong drive to reduce uncertainty during entry to new roles by engaging in a variety of information-seeking behaviors and striving to develop new social relationships (Louis, 1980; Morrison, 2002; Van Maanen & Schein, 1979). Bauer, Bodner, Erdogan, Truxillo, and Tucker (2007) used meta-analytical and path-modeling techniques to test a model of the relation among various antecedents and outcomes of newcomer adjustment previously reported in the literature. Their results generally supported Feldman’s (1981) model of newcomer adjustment by showing that role clarity, self-efficacy, and social acceptance were three key indicators of newcomer role adjustment. *Role clarity* refers to acquiring knowledge about the new role-related demands and challenges, expectations, and how the new role interfaces with other organizational roles. This includes tacit knowledge that may require a deeper search and discovery process. *Self-efficacy* refers to the newcomer becoming proficient in the new competencies required by the new role and applying those competencies successfully to meet the new role challenges. Early successes help build this confidence. *Social acceptance* refers to building new work relationships with peers, direct reports, and other key stakeholders. Building such relationships serves not only to help align expectations for role performance, but also provides important social support during a period of uncertainty, anxiety, and stress. This is consistent with what Fisher (1986) recommended in proposing that effective role transitions required attention not only to learning new tasks, but also to developing new effective working relationships.

Charan, Drotter, and Noel (2001) offered a framework, based in part on the work of Mahler (1986), that outlined the shift in role demands and the different skills and behavior needed for success as a leader progresses to higher or more expanded levels of responsibility within a management hierarchy. They defined a typology of six major “career passages” as one moves from individual contributor to managing

others, to managing other managers, to managing a functional area, to group manager, and finally to enterprise-wide manager. Each passage represents a major change in job requirements that translates to the need to learn new skills, to develop a different time horizon perspective and to change one's understanding of the primary focus of work. Although this typology is informative, the authors did not explain how a new leader makes the transitions associated with each passage, nor did they offer recommendations for actions the new leader may take to facilitate successful passage. Their work also did not address the challenges associated with lateral moves.

Other research has examined how the transition process to a new leadership role is managed. Gabarro's (1987) study of executives moving into new roles found that nearly all moved through a sequence of five different learning and action stages that helped them assimilate into their new role. The early stages focus on various information-seeking tactics similar to what has been discussed in the newcomer socialization literature presented briefly above. These five stages included taking hold, immersion, reshaping, consolidation, and refinement. During the initial stage, *taking hold*, the executive becomes oriented to the new situation and begins to develop a mental model or cognitive map of the new role and the organization within which it resides. During *immersion*, the new executive seeks a deeper learning and diagnosis of the key issues and problems he or she is now facing in the new role. *Reshaping* activities include a focus on addressing the issues and problems identified in the prior stage. *Consolidation* is the final action stage where improvements made are embedded into organizational and operational practices and processes. *Refinement* is the ongoing process of taking charge where the executive is fully assimilated into the new role.

Hill (2003) discovered that most managers entering a new role needed to undergo a mental transition during which they redefined their expectations and reconciled their past expectations with the realities of their new role and organizational context. Similar to the organizational socialization theorists and researchers, Hill also stressed that a key element of successful transitions was the building of new relationships needed for success in the role. Bebb (2004) found that executives who had successfully transitioned from the functional manager role to a broader general manager role attributed their success in part to their early conduct of inquiry into the new situation. This inquiry included soliciting the views of others about existing issues, trying to learn more about the motivations and concerns of their new team members, and engaging the new team members in addressing pressing issues. Across this research, there is the implication that successful leadership transitions require adaptation on the part of the new leader and members of the leader's new team of direct reports, as well as others with whom the new leader now needs to collaborate. These findings support the importance of managing the social context in addition to adopting and demonstrating new competencies and shifting mental models in successful new leader role transitions.

In summary, there appears to be some agreement about what is important for leaders entering a new role to learn and understand. This includes learning the specific business and organizational challenges confronting them, the talents and needs of their new direct reports, existing dynamics and norms that influence individual and collective behavior within their new direct report team, their new direct reports' expectations, as well as similar expectations of peers and others with whom the new leader will now interface. If the new leader comes from outside the organization, there is the added challenge of learning the new organization culture. What is less explicitly explained are the specific activities that can help produce this role-related new knowledge.

Sometimes new leaders acquire some of this knowledge and insight from the various discussions that occur during the selection interviewing process, especially if some peers and direct reports participate. Wanous (1980) was one of the first to call attention to the function of "realistic job previews" during the hiring process in helping orient newcomers to the role they are seeking and to align initial expectations about role performance. Additional information of this type may be learned from the briefing new leaders commonly receive from their new boss once hired. Often this discussion between the new leader and his or her new boss covers such topics as the boss's view of key business issues and priorities, some discussion of performance expectations, and sometimes even a cursory review of direct reports' individual and team-related capabilities. Although this learning is valuable in helping familiarize the new leader with the new role and the boss's expectations for role performance, it provides only a limited glimpse of the reality the new leader

is entering. What is missing is the important engagement of the new leader with his or her new direct reports. Besides the value of the new leader learning first hand the direct reports' perspectives of key issues and challenges, the new direct reports also need to learn important things about their new leader. For example, direct reports wonder about their new leader's priorities, personal values, management style, preferences, and expectations. They also are curious about what future directions may be pursued and what changes may be initiated by their new boss. In addition, it is natural for new direct reports to want their new leader to know about their own individual and collective talents, goals, and aspirations. Left to natural occurrence, this type of mutual interpersonal learning may take weeks or even months to occur as the new leader and his or her new direct reports "feel each other out" and vigilantly try to read cues from each other as to how best to interact and work together. In the meantime, some awkward, possibly embarrassing, and even relationship-threatening incidents may occur when tacit expectations are not met, assumptions violated, signals misread, or important things left unsaid because of uncertainty about how they will be received. While attention and energy is focused on trying to "read the boss" and the new leader trying to "gauge" his or her new team, performance may be hindered.

The remainder of this article describes a structured intervention for accelerating and shortening a new leader's and his or her new team's mutual assimilation period and learning curve. This intervention draws directly from the transition and newcomer socialization theory and research discussed earlier by addressing the two primary tasks deemed critical to successful new role transitions: information seeking about the challenges, context, and subtle nuances of the new role, and developing relationships with new peers and direct reports, as well as the advised strategies discussed for managing these issues (Bauer et al., 2007; Bradt et al., 2009; Feldman, 1981; Van Maanen & Schein, 1979; Watkins, 2003). It blends elements of executive coaching with team development and follows an action-research approach (Collier, 1945; Lewin, 1946). This intervention is designed to surface and explicitly address the common questions and concerns new leaders and their new direct reports have about each other as they initiate a new working relationship. In addition, this intervention mobilizes the new leader and direct report team to reach agreement on a shared action agenda for the near term. Specific intervention related objectives include

- promote mutual learning between the new leader and his or her direct reports regarding personal styles, values, preferences, motivators, aspirations, and backgrounds to lay the foundation for building mutual respect and trust;
- clarify, define, and establish mutual expectations for how the new leader and direct reports will work together;
- reach shared understanding about significant business, organizational, and operational issues, challenges, and opportunities for future success; and
- develop an initial set of shared priorities and action items, and a near-term plan for tackling them.

This intervention includes five sequential action steps described below. Each action step comprises a set of important activities that the consulting psychologist performs in collaboration with the new leader. Although the intervention description that follows is limited in scope to the new leader and his or her new direct report team, other important stakeholders, such as the leader's new peers and internal and external customers and suppliers, may also be included. However, if these additional stakeholders are included, it is recommended that separate work sessions are conducted for each different homogeneous stakeholder group, and substantive learning acquired and agreements reached are shared across the different groups.

### **Step 1. Launch**

In my experience, the request for this type of consulting assistance is likely to come from one of three sources: the executive him- or herself, the executive's immediate boss, or a human resources leader who understands the benefits of this type of intervention. In most cases, the request has come

to me as a result of a prior consulting relationship. If the request comes from a source other than the new executive, then some form of what I call *collateral contracting* needs to occur. Collateral contracting is contracting with multiple parties or stakeholders. Consistent with how Weisbord (1973) and Block (2000) described it, by contracting I mean the explicit discussion with the client that establishes the purpose, desired outcomes, scope of work, approach and specific methods to be used, timing, and ground rules for working together. I also like to explore and reach agreement on what success for our work together will look like and examine key factors that will likely contribute to such success. If the executive's boss or human resources leader is the initial source of the initial request, I ask them to brief the executive on the nature and anticipated benefits of this intervention, why they are recommending me as a resource, and ask that the executive contact me directly.

One of the key benefits I emphasize with my new client is the research that indicates that the first 90 days or so of a leadership transition have a significant impact on a new leader's future success and that many senior leaders (more than 40%) fail within the 18 months from the date they entered a new role (Dotich et al., 2004; Institute of Executive Development & Alexcel Group, 2007). This information usually catches the new leader's interest. I may provide these referral agents with written information to share with the executive to aid their briefing. Regardless of the source of initial request for this work, and even if collateral contracting is used, I always view the executive involved in the role transition as my primary client.

After finalizing contracting with the executive, I like to meet with the executive and his or her boss, regardless of whether the boss was the initial referring agent or not, so that the three of us can align our expectations regarding this process and outcomes. I also want to learn the extent to which they have had their own conversation about mutual expectations and challenges or other issues the new leader will be facing. Another reason for including my client's boss in this discussion is to make explicit and to reach agreement on the important issue of confidentiality. I want the executive's boss to understand that my principal commitment is to preserve confidentiality with the new leader. I explain that I will always encourage the new leader to share with the boss learnings acquired during the intervention, but that I will not do so myself. This is a very important explicit agreement to reach so that my client feels comfortable and confident in our working relationship.

Executives, even those who may have engaged in this type of intervention before or a similar team development, can be expected to have some anxiety about it. Often such anxiety is related to feelings of uncertainty and vulnerability. Clarifying how sensitive information will be managed is important in helping manage some of this anxiety. However, even after having reached apparent agreement on how I intend to manage confidentiality, some bosses will still contact me during the course of the intervention to ask whether I am learning anything that is important for them to know. In such circumstances, I very politely remind them of our confidentiality agreement and suggest that they ask the executive about anything they would like to learn.

During my contracting discussions with my client, I also spend an equal amount of time exploring and reaching agreement on the more socioemotional aspects of our working relationship. As Block (2000) and others have suggested, this type of contracting requires that the consultant and client ask for what they want and need from each other for an effective working relationship. I want to understand my client's hopes, fears, concerns, and expectations about the work we are initiating and about the new role he or she is entering. This discussion helps me begin to understand my client's needs such as his or her tolerance for ambiguity, risk, and control, as well as to get some indication of his or her interpersonal style. I also want to discuss our mutual preferences for working together and our respective values that will drive the work. For example, I want the executive to know and agree that I view an important function of my role as raising difficult or challenging issues. I explain that although I understand that he or she may not always agree with me or even want to pursue further discussion of them, I do expect some consideration of issues I raise. Although the executive has the free will to say "no" to me, I want to maintain the prerogative to push on an issue. If the leader is a new client, I also will want to learn about his or her past experiences working with other consultants. In particular, this information provides me with some insight into how I might effectively manage our new working relationship.

My contracting discussions with the executive vary depending on whether I have worked with this particular executive before or he or she has prior experience with this type of intervention.

However, regardless of the nature or extent of a prior consultant–client relationship, it is still very critical to reach explicit agreement on the substantive task-related issues and socioemotional issues identified. Because this intervention uses individual interviewing as a data collection method, it is also important to ensure that the executive understands that the information to be collected will remain anonymous, i.e., comments will not be attributed to any one in particular. Only group-level affiliation will be identified and an aggregated summary of information collected will be provided.

I prefer to summarize our agreements in a written form that I submit to my client for review and sign off. I believe that doing so offers an affirmation of and check on the extent that mutual understanding has been achieved and provides a reference for how we will manage unanticipated issues that emerge during the course of the intervention. Once the contracting process has been completed, I begin engaging my client in the work. First is the issue of how to manage the communications to his or her direct reports and other participants about this process. It is important for the executive to send out this communication, whether written or verbal. The key messages in this communication include the general purpose and desired outcomes for this work, a description of the approach and planned timing, the length of the individual interviews, how they will be scheduled, how the interview information will be used, and how anonymity and confidentiality will be managed. It is also useful to provide some of the key interview topics to help interviewees prepare for the interviews.

As the interviews are being scheduled, I send a preparatory assignment to my client. This assignment includes the following questions:

1. What factors or reasons led you to this new role?
2. What are some of your initial impressions of the new organization and new role?
3. What is a “burning question” you would like your new direct reports (or others) to answer?
4. What most excites you about this new role and what are some concerns?
5. What are your initial hopes and expectations for the new team or organization?
6. How would you describe your leadership style? What are the central beliefs and values that drive this management philosophy?
7. What are personal preferences or work-related idiosyncrasies that others should know about to work with you effectively? What are some personal “hot buttons” or “pet peeves” that are useful for others to know about?
8. What is something that others may not likely know about you (e.g., past experiences, prior careers, hobbies or special interests outside of work etc.)?

## **Step 2. Leader Preparation and Team Member Interviews**

While I am conducting the individual interviews with the direct reports or any other stakeholders, I also meet 1–2 times with the executive to discuss and develop responses to the preparatory questions listed above. The interviews are typically scheduled for 1 hr, and my preference is always to conduct these in person, although because of extenuating circumstances and my desire to complete the work in a timely manner, I have compromised at times and conducted these by phone. Although all interviewees have received the communication prior to my meeting with them, I always begin the interview by reviewing the purpose and desired outcomes of the process, the specific objectives of the interview itself, and explain how I intend to preserve participants’ anonymity. I make the distinction between *confidentiality* and *anonymity*. For purposes of this type of engagement, I inform interviewees that what they tell me will not be anonymous because I intend to integrate it with what others tell me, summarize and report back to the leader. I inform them that I will also be sharing this summary with the direct report team. However, I commit to them that I will not be attributing anything I am told to any individual. I then ask for their help with this. I explain that I may choose to use some of their words or expressions as an illustration of a topic or theme in my interview summary. However, because I am not familiar enough with the group to know whether anyone may recognize this type of illustration, I ask for their help in preserving their

confidentiality. I request that they let me know if my possible use of any of their verbatim comments for illustrative purposes may inadvertently reveal their identity. I would then commit to disguising it in some manner or not to use it. This encourages some degree of shared responsibility on the part of interviewees for protecting confidentiality. Even though, in most instances, interviewees respond that they have no hesitation about my making public what they tell me, I know they are grateful for the care with which I treat the issue of confidentiality. I believe that making this ground rule explicit helps create the conditions of trust and encourages interviewee candor.

I like to begin the interview by asking a benign question about the person's current work. This helps put the interviewee at ease by talking about a comfortable topic. The interview guide used includes the following:

1. Tell me about your current role here and how long you have been in this role.
2. What are the key challenges and opportunities facing your team or organization?
3. What are suggestions or recommendations for meeting these challenges and taking advantage of the opportunities identified?
4. If you were in your new boss's role and assumed leadership of this organization or team, what would be your top two priorities for action at this time?
5. What do you already know about your new boss? What don't you know and would like to know?
6. What would you like your new boss to know about you? About the team?
7. What do you expect/want from your new leader that will help you perform your job most effectively?
8. What are your hopes and concerns about your new boss coming into his or her new role? What are some of your expectations of him/her?
9. What advice might you provide your new boss to assist him/her in being successful with this organization in this new role?

After each interview, I summarize my notes, including adding in the margins some of my observations, developing hypotheses, or questions I may want to explore further in subsequent interviews. After completing three interviews, I typically begin a cursory thematic analysis of responses organized within each question. This type of early and ongoing data analysis is consistent with common practice in qualitative data analysis methods (Symon & Cassell, 1998). The primary data analysis method used is an abbreviated form of content or thematic analysis (Boyatzis, 1998). First, interview responses are organized by question and then by clusters of similar responses to each question. I pay attention to frequency of similar types of responses, such as noting the number of interviewees who referenced a particular topic, but each interviewee is counted only once regardless of how many times each returned to or repeated a comment or reference to a topic. I then assign a thematic title that I believe optimally captures the content of the cluster of similar responses. In the summary feedback report, I tend to maintain the interview guide topics as the major organizational format. Within each topic, I provide the key themes identified. I structure the themes into direct statements such as "There is considerable agreement among direct reports that the biggest challenge facing the business unit is rebuilding its reputation," or "The strongest shared expectation for [boss's name] is to encourage more sharing of ideas and practices across functions/work groups." I then provide subthemes for each major theme and outline verbatim or paraphrased interviewee comments that illustrate the theme or subthemes. Throughout, I strive for simplicity and clarity in how the interview data are organized and presented.

### **Step 3. New Leader Feedback Meeting**

Following the preparation of the interview summary report, I next meet with my client to review the information. This meeting is similar in many ways to a general feedback and coaching session. It has two principal objectives. One is to brief my client about what has been learned from the interviews and explore his or her reactions to it. This requires not only reviewing the substance of

my summary report, but also adding my own “color commentary” as appropriate in the interest of deepening my client’s appreciation of the context within which the information was conveyed. For example, I may comment that most interviewees seemed to feel at ease and express themselves openly, or I might comment that I experienced some as being cautious about what they said and how they said it, or that there was considerable shared enthusiasm for a particular topic area. The intent is to help my client feel as if he or she had been present in the interviews with me.

As I feed back the interview data, I continually query my client about what he or she is finding most interesting or surprising about the interview data, and what if anything confirms what he or she may have suspected or heard already from others. This type of feedback meeting is different from those most commonly conducted as part of an organization, team, or multiple rater assessment process. In those situations, the consultant needs to attend to and manage the client’s anxiety, defensiveness, and perhaps anger in response to critical feedback. In contrast, in this situation the new leader is eager to learn what the interviewees had to say and what they are most curious about. The second objective for this feedback meeting is to assist my client in preparing for the upcoming team session and ensuring that his or her responses to the preparatory questions are aligned with and responsive to the wants and needs expressed in the interview data. In addition, I want to help my client frame and even rehearse what he or she is intending to say and how. My aim is to ensure an appropriate level of self-disclosure and transparency about who he or she is and how he or she thinks and behaves. I try to place myself in the role of one of the direct reports when helping my client prepare work by asking myself two questions: (a) To what extent is this responding to what I want to learn about my new boss? (b) To what extent does it convey to me something about who this person is and how he or she thinks about things?

Often a second meeting is needed to complete the preparation process and to review my suggested plan for the upcoming group session and perhaps modify that plan on the basis of my client’s preferences and input.

#### **Step 4. Team Feedback and Working Session**

The team feedback and working session is frequently held offsite to shield the team’s work from the expected interruptions and distractions of daily work at the office. The more relaxed atmosphere of the offsite setting is also more conducive to team member bonding and camaraderie building. The meeting is typically planned for a day and half. This meeting timeframe allows for some flexibility in managing team discussions. Even though the direct report team may have been together for some time, with the addition of a new leader, I view this session as a quasi-new team startup. New teams require additional time for divergent discussions and “excursions” from the established agenda topics so that they can gain familiarity with each other and begin to develop their own distinctive group processes. Table 1 offers an example of a design plan and agenda for this team feedback and working session.

Although there are a variety of group development models with different numbers of developmental stages, different names assigned to such stages, and even which developmental issues are linked to which stage, there is general consensus that the initial or start-up stage is all about members’ orientation to each other and the group. This includes reaching consensus about group goals, how group members will work together to achieve those goals, and the striving to know others and be known (Bradford, Gibb, & Benne, 1964; Drexler, Sibbet, & Forrester, 1988; Dyer, 1977; Tuckman, 1965). Gadon (1988) discussed the effect on group development when a new member joins the group. New members often disrupt established team member relationships, subgroup composition, and existing power structures. This impact is even more pronounced when the new member is the formal leader. Therefore, the consultant can expect to witness overt and more subtle forms of vying among direct reports for protection or change in the existing “pecking order” and coalitions vis-à-vis the new leader.

A sample agenda for this meeting is provided in Table 1. Typically, the session is kicked off by the new leader who reviews the desired outcomes and agenda for the meeting, as well as facilitates the group in identifying “meeting ground rules.” Meeting ground rules establish agreements among the team for how they will work together to achieve the desired outcomes. These ground rules are

Table 1  
*New Leader Assimilation: Team Offsite Sample Meeting Plan*

Topic	Outcome(s)	Process	Who	Timing
Welcome and overview	<ul style="list-style-type: none"> <li>● Clarify purpose and plan</li> </ul>	<ul style="list-style-type: none"> <li>● Introductions</li> <li>● Review purpose and desired outcomes for meeting, topics, and design</li> <li>● Agree to meeting "ground rules"</li> <li>● Form small groups</li> </ul>	Leader	25–30 min
Warm-up: "Conocimiento"	<ul style="list-style-type: none"> <li>● Discover things we have in common</li> </ul>	<ul style="list-style-type: none"> <li>✓ Birth order</li> <li>✓ Geography where raised</li> <li>✓ Favorite types of movies</li> <li>✓ Favorite sport/recreational activity</li> <li>✓ When joined company</li> </ul>	Everyone	40–45 min
Exercise: Learning about each other (1)	<ul style="list-style-type: none"> <li>● Learn something new about each other</li> </ul>	<ul style="list-style-type: none"> <li>● Each person presents the "artifact" brought and explains its significance and story</li> </ul>	2–3 participants	10–15 min
Challenges and opportunities	<ul style="list-style-type: none"> <li>● Shared understanding of issues facing organization</li> </ul>	<ul style="list-style-type: none"> <li>● Feedback data from interviews</li> <li>● Explore issues for common understanding</li> <li>● Identify top challenges and opportunities to address</li> </ul>	Consultant and team	60–75 min
Exercise: Learning about each other (2)	<ul style="list-style-type: none"> <li>● Learn something new about each other</li> </ul>	<ul style="list-style-type: none"> <li>● Each person presents the "artifact" brought and explains its significance and story</li> </ul>	1–2 participants	10–15 min
Dialogue session: Getting better acquainted	<ul style="list-style-type: none"> <li>● Relationship building</li> <li>● Explore mutual expectations</li> <li>● Establish work relationship agreements</li> </ul>	<ul style="list-style-type: none"> <li>● Leader offers brief biographical sketch of journey to new role</li> <li>● New leader shares initial impressions and musings about first weeks in organization</li> <li>● Leader discusses questions posed by team members in interviews and shares personal expectations with group</li> </ul>	Leader and team members	90–105 min

(table continues)

Table 1 (*continued*)

Topic	Outcome(s)	Process	Who	Timing
		<ul style="list-style-type: none"> <li>Each team member tells new leader what he/she would like the leader to know about him/her personally</li> <li>Staff provide “advice” to new leader about organization—something important for him/her to know to be successful (culture/style related)</li> <li>Continue Q &amp; A</li> </ul>		
Lunch				
Exercise: Learning about each other (3)	<ul style="list-style-type: none"> <li>Learn something new about each other</li> </ul>	<ul style="list-style-type: none"> <li>Each person presents the “artifact” brought and explains its significance and story</li> </ul>	Remaining team members	10–15 min
Building our short-term agenda	<ul style="list-style-type: none"> <li>Agree on priorities and initial plan of action</li> </ul>	<ul style="list-style-type: none"> <li>Team reviews and explores issues identified</li> <li>Set criteria for choosing priorities</li> <li>Select highest priority (3 or 4) for focus</li> <li>Explore each issue in depth and brainstorm strategies</li> <li>Select preferred strategies</li> <li>Identify associated risks and determine risk mitigation actions</li> <li>Assign accountabilities, timelines, and deliverables</li> </ul>	Full team	150–180 min (or until completion)
Next steps	<ul style="list-style-type: none"> <li>Agree on follow-up actions and responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>Agree on expectations and respective roles for managing action plan</li> <li>Agree on approach for communicating with staff and other key stakeholders</li> <li>Debrief and assess offsite session</li> </ul>	Full team	30–45 min

important given the start-up nature of this team session. Such ground rules often cover individual team member behavior, group processes, and how working team member working relationships will be managed. Common ground rules for this type of working session have included team members agreeing to

- fully participate and speak directly and candidly about issues;
- actively listen to and consider others points of views;
- assume personal responsibility for keeping the work on track and ensuring an acceptable level of closure is achieved on issues;
- provide critique and comments on other's ideas in a respectful manner; and
- reach consensus such that all feel that they have had a chance to influence the decision or agreement.

Agreement on such ground rules also helps establish the team's shared responsibility for the success of the meeting and begins to form new team norms for working together.

I usually prefer to start the session with some form of "ice breaker" or warm-up activity. Scannel and Newstrom (1991) have put together a fairly comprehensive compilation of such structured activities. Sometimes I have asked each participant to bring some "artifact" that has significance for him/her or conveys something personally that others may not know. Throughout the day, I ask different members to show their artifact and explain why they chose to bring it and to tell the story surrounding it. Another ice breaker I have used successfully is called "Conocimiento." This translates very roughly from Spanish as "getting to know each other." In this activity, team members are asked on cue to form small ad hoc affinity groups that share certain characteristics like birth order in their family of origin, having lived overseas, types of sports or hobbies they pursue, and their preferred ethnic food, movies, or books. Once the groups are formed, they are given a few minutes to discuss what they share in common. Even in groups that have worked together for some time, this activity elicits new knowledge about each other.

Next is a presentation and discussion of the interview information, beginning with key challenges and opportunities identified. During this discussion, the leader is advised to assume a posture of inquiry by asking questions and exploring the direct reports' views and perspectives, as well as concerns expressed. Although many leaders tend to want to jump quickly to solutions, it is important to encourage their active listening, exploration of issues identified, and holding back on moving to action prematurely. Doing so not only enhances their own learning about the situation, but also helps build their credibility with their direct reports by showing interest in their direct reports' point of view and not moving into action until a fuller appreciation of the distinctiveness of the new situation is acquired. As part of the preparatory work with my clients, I advise them about this. This segment concludes when the team members believe they have achieved a reasonable shared understanding of key issues. The prioritizing and action planning is postponed until later.

The next agenda item is a dialogue between the new leader and the direct reports to promote their getting to know and understand each other better. At this point, the leader shares his or her initial impressions of the new role and the organization, responds to the specific questions raised by the direct reports from the interviews, and provides some insight about his or her personal values, expectations of the direct reports, and provides them with advice for how to work most effectively with him or her. For example, one client, the new chief technology officer of a multistate hospital system, related her early impressions when she first joined the organization and assumed her new role. This included her feeling that the information technology (IT) department was being asked to do a lot with inadequate resources from the company, and that she observed her direct reports and other staff as dedicated to their work and being highly service oriented to their internal customers. She added that this latter observation was something she found to be unusual in her past experience leading similar technical business support operations. She went on to say that she had a sense that much of the unit's work may not be linked strongly enough to the company's strategic priorities. She further commented that although she believed her direct reports and other IT staff were quite talented, those talents were not being maximized, and she acknowledged the possible undermining

of morale by the use of what she termed “too many outside consultants” doing all the interesting work.

She then began to self-disclose some things about herself. She shared her belief that an IT department’s mission and key contribution were providing tools for the business to succeed, but she also suggested that she viewed the department’s role as an active contributor not only to capital investments, but enabling the company’s execution on its strategic directions and priorities. In speaking about herself on a personal level, she discussed the great importance she placed on following through on commitments agreed to and the strong value she held for people she works with to tell her the uncensored truth. This meant not only saying what others may think she wants to hear but what she needs to hear. She continued that one of her “pet peeves” was being surprised by problems that may be too far along to be resolved effectively. She also described how she attributed part of her past success to her ability to manage upward effectively, and that she viewed herself as an advocate for those who worked in her organization. She then explained why she wanted to take this new position, her emerging vision for the IT organization, and how she viewed success. This type of self-disclosure on the part of the new leader sets the tone for similar personal disclosures on the part of the direct reports, resulting in meaningful exchanges that clarify mutual expectations, reduce equivocality, and lay the foundation for interpersonal trust building between the new leader and his or her direct reports.

The role of the organizational or consulting psychologist in this session is a combination of facilitator and process consultant. In both roles, the consultant should refrain from becoming involved in content-related discussions. Because these two roles are different from my prior interactions with the group members, I always establish an oral contract with the group at the start of this meeting about the roles I intend to play within the meeting. I want to ensure that our expectations are aligned and that I have their endorsement, as well as establish legitimacy for any interventions I may choose to make into their team process and dynamics during the meeting. After the leader reviews the meeting agenda and desired outcomes, I tell the team I would like to take a few minutes to discuss how I view my role during this meeting. Here is an example of what I say in establishing this oral contract with the team about my role:

I view my role in today’s meeting as assisting you as needed to accomplish the desired outcomes we have established. In that capacity, I will comment periodically about what I observe happening as you work together. My intent will be to help you attend to, examine, and manage your team dynamics to facilitate your work together. I will stay out of the content of your work since I view that as your responsibility and expertise. I may at times ask questions of you as a group or individually to help explore an issue or clarify something. I do not expect that you will accept all my comments, but I hope that you will at least consider them.

I then ask for any questions or other expectations they may have.

As facilitator, I work to assist the group to move through its agenda within the timeframes established or renegotiate those timeframes if additional time is needed to complete a task or close off a discussion. I assume responsibility for helping enable effective and efficient task accomplishment by the group. I commonly engage my client, the new leader, to be my cofacilitator, and also encourage all team members to play an active role in ensuring that planned work is performed productively and the desired outcomes are achieved. In the process consultant role, my focus is on the ongoing dynamics of the team. My attention is focused on both the task-and maintenance-related behaviors as well as on overt and covert team processes (Bales, 1950). I follow Reddy’s (1994) advice about making team process interventions. He advised that interventions into team members’ emotional or interpersonal dynamics should always be in the interests of task accomplishment, be short and to the point, and only go as deep as necessary to move the team forward on the task at hand constructively. The aim is to prompt team members to attend to and examine team dynamics that may be useful or impeding their work together. Such interventions often call the group’s attention to specific patterns of interaction or behavior observed and may express the consultant’s own feelings as a reflection of what others may be experiencing. Similar to delivering feedback, team process interventions are most effective when they are descriptive and nonevaluative, specific rather

than general, offer feedback for consideration rather than impose, and focus feedback on behavior that can be changed. One useful process-focused intervention is periodically stopping the team's work by asking, "Let me check in quickly with you. How do you feel things are going right now?" All team members need not respond, or even agree, but this check-in helps the team take a moment to attend to their process and feelings about their work, as well as gauge how effectively they are working. All successful process consultants need to develop "thick skin" because some of their interventions may be criticized, defended against, or simply ignored.

The later portion of the meeting is focused back on the challenges, opportunities, and other issues identified earlier. Priorities are established, and by the end of the meeting, an action plan should be defined and a set of follow-up actions agreed to. The action plan outlines how each priority will be addressed and usually identifies the strategies and actions to be pursued, the timeline, who has primary responsibility, and the key deliverable or output expected. Other postmeeting next steps may include institutionalizing the ground rules established for this meeting to serve as agreements for all team meetings; the leader and direct reports publicly committing to manage their working relationship according to the newly acquired knowledge and understanding of mutual expectations, needs, and preferences; assigning responsibility for who will gather additional information about questions identified and not answered during the meeting; and scheduling a follow-up meeting dedicated to continuing the work started in this meeting.

I usually close this meeting with a large-group evaluation of the day's work using the desired outcomes as the evaluation criteria. This provides what Kirkpatrick (1994) referred to as first- and second-level evaluation that includes participant reactions and learning acquisition. I want to know from participants what they found useful or beneficial from the process and the extent each believes the desired outcomes were achieved. I also ask them to identify two or three key personal "take-aways" from the day's work that denote learnings they have acquired during the session. The most consistent value reported by the direct reports has been getting to know more about their new boss, including his or her aspirations, expectations, management philosophy, and how to work effectively with him or her. New leaders have appreciated the structured process for conveying this information about themselves and learning more about the expectations, needs, and backgrounds of their new direct reports. Both the new leader and direct reports appreciated coming away with a set of shared near-term priorities and an action plan for addressing them.

### **Step 5. Follow-Up**

A day or two after the team meeting, I meet with my client to review his or her reactions to what occurred at the offsite session in more depth and explore the extent that the expectations for this work together have been met. I also want to discuss what information he or she will be comfortable sharing with his or her new boss about the work that took place. What specifically is shared with the boss and how much detail is gone into will depend on the nature of the developing relationship with the boss, but at a minimum, I encourage my client to highlight his or her key learnings from the process and share the priorities defined by the team and the action plan established. This helps close the "loop" with the boss from the initial contracting process and provides a forum for the boss to provide input and feedback on the priorities and plan, as well as ensures the boss's formal sanctioning and support for the action plan and perhaps any additional resources required to execute it.

As part of my original client contract, I include a couple of additional follow-up sessions in the scope of work. One follow-up is an individual meeting with the new leader about 1 month after the team offsite session. The primary purpose of this meeting is to check in with the client about how the assimilation process is going, review the status of the team's action plan, and discuss any emergent issues he or she may be confronting. The second follow-up meeting is with the full team to review its progress on the action plan, make adjustments to the original plan as needed, and generally check in with the full group about how the mutual assimilation and relationship building process is going. This team meeting is usually scheduled around 4–6 weeks following the initial team session. I prefer to keep this team follow-up meeting separate from the team's regularly

scheduled meetings to designate it formally as part of the process we initiated a couple of months earlier.

Sometimes, these follow-up meetings evolve into new consulting work that goes beyond the original scope of work. Securing “add-on” consulting work in one form or another has been a consistent benefit I have realized from this type of intervention. Often, the new leader requests some additional ongoing or time-limited individual coaching services to support further his or her development in the new role. Sometimes, I have been engaged for more in-depth team development work to help improve the way members work together. Other times, I have been engaged to provide change management assistance related to the implementation of the priority initiatives established as part of the near-term action plan. When such new opportunities emerge, I always treat them as new scopes of work and go through a formal, if somewhat abbreviated, contracting process to define the parameters, expectations, and respective roles for such work.

Although I have not conducted formal research to evaluate this intervention’s effectiveness, I have maintained working relationships with many of the executives who have engaged in this process with me. As a result, I have some limited data to report from a sample of 16. A total of 75% of these executives remained in their new roles for 2 years and over two thirds remained in their new roles for at least 5 years. Six were promoted within an average of 5 years from the time they first assumed the new role. In addition, several experienced executives who participated in this process reported that it helped them transition and assimilate faster into their new role compared with their prior role change experiences over their career.

Additional research on this intervention and its impact would be useful. Such research might examine other outcomes such as the new leader’s performance and productivity over time as assessed by multiple raters such as direct reports, boss, and other key stakeholders, as well as more objective measures like revenue growth, profitability, management team voluntary turnover, and measures of operating efficiency. A more rigorous research approach might use a matched groups design to compare the performance of leaders who engage in this type of structured transition and assimilation process with those who do not to see whether there are any notable differences in subsequent performance, including the time it takes to reach expected performance levels, involuntary turnover rates, and length of time spent in the new role.

## Summary

In summary, I have presented an intervention targeted at accelerating the effective transition and assimilation into a new leadership role. It is offered as an example of a professional practice opportunity for consulting psychologists linked to the expanding business issue of increased executive and manager movement into new roles confronting many organizations today. This intervention draws from the literature on role transitions and newcomer socialization and is designed to address the common challenges confronted by leaders entering new roles. This article is not intended to offer a specific cookbook recipe or prescriptive methodology for how a new leader assimilation intervention should be conducted. Instead, what is offered is a sample approach, some design-related considerations, and a few suggested techniques. Most important, my aim was to share what I have discovered to be important issues requiring the consultant’s attention and skillful management to position this intervention for success. As is true of all behavioral science interventions into any social system, the specific design and methods used should be customized to meet the unique needs of the client context and tempered by the current capabilities of the interventionist.

This article also calls attention to the observation that practice may have outpaced research in helping us more fully understand and support the experience of leaders undergoing role-related transitions. More empirical and qualitative-based research are needed to help us learn more about the dynamics of this unique transitional experience, define with increased clarity the factors that differentiate successful from less successful transitions, and perhaps learn how this transition and assimilation process can be accelerated in effective ways. In addition, research is needed to help learn whether and in what ways this specific intervention may contribute to facilitating effective role

transitions of leaders. I also encourage other practitioners to share their experiences, techniques, and insights with similar interventions to keep the dialog going and our learning increasing.

There does not seem to be any indication that the volume or frequency of movement by executives into new roles will decrease anytime in the foreseeable future. Mergers and acquisitions continue to be a key strategy for quick growth into new markets and expansion of business capabilities even during challenging economic periods. As organizations grow their business and reconfigure or “right-size” themselves to achieve economies of scale and improved performance, leadership role transitions can be expected to continue. Add to this the expected large numbers of retirements of baby boomer leaders over the next few years that will require a new generation of leaders stepping into vacated roles. The ability of leaders and their organizations to quickly and effectively facilitate and manage such role transitions is likely to become a core strategic competency with clear bottom-line implications. The new leader transition and assimilation process described in this article has the potential to bring enormous benefit to organizations and their leaders who need to navigate these transitions quickly and effectively. At the same time, it also offers new opportunities for consulting psychologists to expand their practice while helping organizations realize this benefit.

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