

An Executive's Checklist for Successful Onboarding

Professional movement is a reality today.

That is especially the case for senior leaders, who tend to transition into new roles every three or four years. This may not necessarily involve moving into a different organization. But both internal and external transitions require successful onboarding—proceeding through those steps that enable an executive to understand the new environment, acclimatize to it, and assume command quickly.

The experience will differ with each new transition, but there is one constant reality: for new leaders as well as for the companies that employ them, the clock will be ticking. Research indicates that companies have just 12 months to make an impression upon a new hire that will keep that executive around for the long run. And getting it wrong in senior leadership roles squanders both time and money for organizations.

On the executive's side, failure in a new role can happen quickly. The corporate world typically expects to see results—justifying the leadership change—within a single business quarter. Thus, the challenge for new executives is not only to effectively integrate into the group and take hold of the leadership reins, but to accelerate the process.

Based upon our extensive experience in helping to place executives into new leadership roles, we have developed a checklist that details the key elements of successful onboarding. As a skilled pilot follows a pre-flight checklist to ready for takeoff, even the most experienced leader needs to progress through each of these essential stages in order to onboard effectively and quickly begin to make his or her mark.

1. Decisively step into the role.

It's up to every new leader to “own” the position. This starts on Day 1, when you must step into the seat with authority, demonstrating a sense of professional confidence, personal commitment, and experience with the type of challenges you will be facing. You were hired and appointed because of your skills and experience, thus you need to show the new organization why you are there.

Get involved with setting the schedule for your first few days and weeks in the job. This will ensure that your early priorities for meetings and other activities can be achieved. The weeks that follow may well include a listening-and-learning tour, including peers, direct reports, and superiors. The insights that you gain from these interactions with new colleagues will only serve to enhance your command of the role.

2. Clarify your personal brand.

For any new leader, key issues to think about here include your professional background and expertise, your motivation in taking the position, and your sense of the value that you will bring to your new role. Do you understand its challenges and opportunities? If you are transitioning to a new company, what motivated you to join it?

Keep in mind that new colleagues make assumptions about any new executive and what he or she stands for. That's far from optimal. But if you want to impact this process, it helps to clarify your brand—first and foremost

for yourself—to ensure that colleagues have a clear picture of you, both professionally and personally. The key point is to consider how the new organization will take you in and see you as the resource it needs for the future challenges. Clarifying your brand will help in this process.

3. Develop an elevator speech.

Once you clarify your personal brand, prepare the messaging that you will deliver around it. This will permit you to shape that early dialogue and convey to new colleagues what they most need to know about you. Don't let them haphazardly create an impression of you. Use this opportunity to instill in them the key messages you want them to walk away with.

Only a few sentences long, this brief introduction should anticipate colleagues' questions and interests. Be ready by Day 1 and be prepared to tailor your summary to different audiences along the way. Since word choice is important, you may prefer to write this down to be sure that you keep the message crisp. It will serve as an emotional ticket-to-entry to the group, so do plan to briefly share some humanizing personal, as well as professional, information.

4. Take charge of the team.

You will need to quickly assess some key information about your new team. How do members interact? What are the strengths of each? Where there are weaknesses and how can they best be addressed? What is the team history, as well as its future potential? Most critically, identify what role each member plays. Your objective will be to assess the team players and, as Jim Collins puts it in his book *Good to Great*, "figure out who is on the bus and what seats they occupy." Once you determine the inner workings, strengths, and weaknesses of the team, you can then focus on motivating the group, building cohesiveness, and starting to achieve results.

Accomplishing this will require keen observation from the early days onward. Genuinely listen to what your new colleagues have to say. In order to drive change, effective collaboration, and a results-orientation, you will need to understand anything resembling resistance, and to earn the respect of your team through insightful leadership.

5. Define your deliverables.

For every executive, demonstrating leadership success during the early months on the job is essential. That starts with setting the right short-term priorities from among the multiple problems that every new role inevitably presents.

Start by clearly defining and prioritizing the tasks and associated deliverables to be achieved during your first 12 months on the job. Secure organizational agreement and team commitment to this plan. But remember, a year is a long time. Savvy new leaders also make sure to target achievable early wins that will boost confidence within the organization as well as the team itself. Make sure these targeted early wins are measurable and in alignment with organizational priorities. Ultimately, these wins should tie back to the purpose of your hire, but more importantly, find ways to have your reports feel that these early wins are team wins.

6. Plan strategically.

One constant is change. The business is changing, competitors are innovating, and markets are transforming. As important as it is for new leaders to make their mark with early successes, it is equally essential to turn the telescope

on the 3-to-5 year horizon. During the onboarding period, you will need to identify longer-term strategic objectives and to achieve buy-in from both your team and institutional leadership.

In some cases, your team's initial wins can serve as stepping stones for projects that will help move you towards some of those more expansive objectives. Make it a priority from these early days onward that your group understands your strategic vision and is adept at pivoting between those projects with shorter- or longer-term frameworks.

7. Create a map.

In order to effect change, you need the right institutional support. It takes care and attention to identify and understand who your stakeholders are, where they work internally or externally, what their preferences and priorities are, why they are important, and other key matters. Mapping them out can be an important step for any new executive in building effective alliances and networks.

Significantly, as many as 60% of managers who fail to onboard successfully point to their own failure to establish working relationships as a primary cause, according to a Society for Human Resource (SHRM) Management report authored by Talya N. Bauer, Ph.D. Creating a detailed map, which includes identifying key stakeholders and understanding their business agendas, will put you on the right path to establishing those productive relationships.

8. Align with stakeholders.

After your roadmap is prepared, you are ready to start reaching out to key stakeholders. Research by Herminia Ibarra at INSEAD suggests that executives actually enhance their strategic capabilities by engaging in activities such as vertical and horizontal networking.

With key stakeholders who have influence over your potential for success, your goal is to achieve meaningful alignment. It helps to develop an action plan for communicating with each of them—based upon the relevant information that you collected during the mapping process. Define your messaging goals and tactics, as well as what you expect to achieve within your first 30, 60, and 90 days on the job. And then be sure to monitor your progress.

9. Become a part of the culture.

Every organization has its own distinct culture that helps to define how people within the organization work, interact, and achieve results. For example, some groups make decisions before a meeting, others during a meeting, yet others after a meeting. As a new leader, your successful onboarding will depend heavily upon your commitment to respect that culture and its intricacies. Learn to appreciate its nuances. Don't make snap judgments. Try to shed your "outsider" status as quickly as possible.

This process of joining and fully integrating into any new culture requires insight and sensitivity. During the early days in your new position, take care that you do not establish goals or try to direct your team in ways that will conflict with cultural norms. Only after you have become a part of the culture will it be appropriate and constructive for you to seek ways to enhance the existing framework by drawing upon experiences and insights you may have developed elsewhere.

10. Build meaningful relationships.

The goal of leadership onboarding is to enable you to fully integrate into the role as quickly as possible and to start delivering results. But rather than pushing in, by leveraging professional skills and experiences while still potentially facing “organ rejection” from the group as a whole, your focus should be on winning their acceptance.

How does this happen? An important way to build bonds with your team and key stakeholders is through shared experiences. These help cement your ties, so that you can get started on the process of working together on the road to strategic success. Shared experiences can be in the form of a collaborative project, team meetings, sharing a meal, or having a conversation. Other ways to bond might include corporate outings, a business trip, or a baseball game. These interactions will help you build social cohesiveness, mutual respect, and admiration. For any new leader, they are a critical step toward integration into the workplace culture.

From our vantage point as long-time professional leadership consultants, we know that this checklist works. And the key to its success is being equally diligent in following all 10 steps. Most new leaders are prepared to focus on traditional managerial skills, such as owning the role and developing a strategic plan. But failure to onboard in a timely and effective manner often happens when a newly placed leader neglects to pay attention to other “softer” essential matters, such as aligning with stakeholders and engaging with the culture. There is no doubt that the road to leadership and business success is filled with challenges. This checklist provides a ready tool for new leaders to smooth the path to successful integration into a new role, build bonds of respect with the team and relevant stakeholders, and earn the reputation of a leader who produces results.

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