

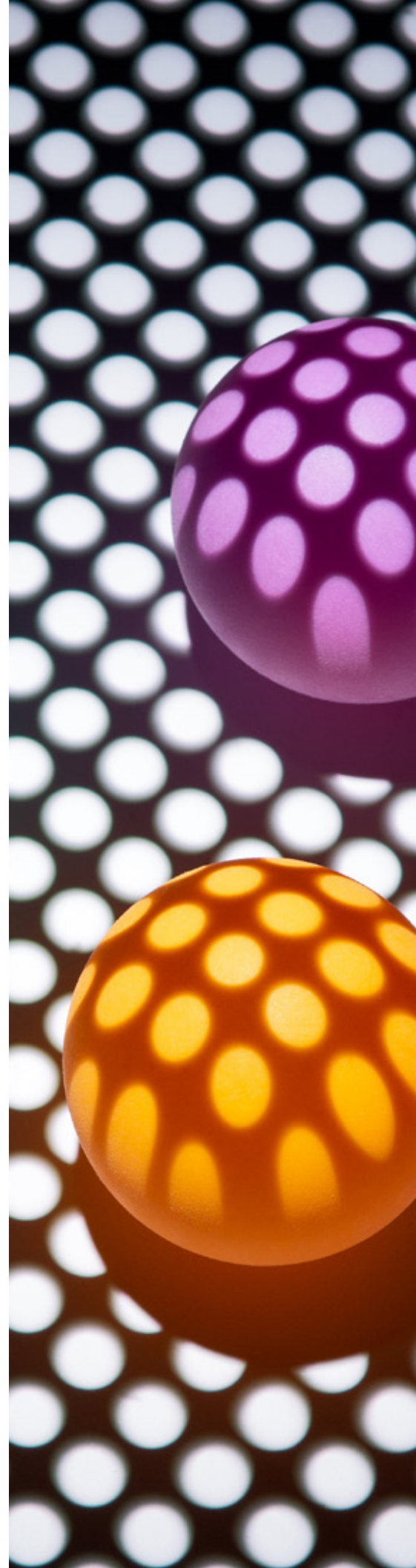
Managing Technology-Enabled Executive Onboarding and Transitions

Even in the best of times, onboarding executive talent is a challenging yet mission-critical endeavor. Many organizations are now contemplating how to onboard executives during a COVID-19 work-from-home situation, while onboarding executives are understandably concerned about how restrictions will impact their ability to build rapport, align their team and pick up on cultural cues.

We believe that the most effective transitions in this environment result from a well-orchestrated onboarding and transition plan that leverages technology and includes more frequent and varied interactions than the norm. A deliberate and focused transition plan can dramatically improve a leader's potential for success, positioning them to do the following:

- » Create a foundation for strong relationships with team members, colleagues and other stakeholders
- » Make important observations about the culture and how work gets done
- » Develop an effective leadership style for the context
- » Begin to shape a vision and strategy for their function or business unit that supports the overall business

Because so much is riding on a strong start, we have collected our best advice for managing a tech-enabled transition.



Leaders transitioning in the current climate should push for an explicit conversation with their boss or the board about how the context and priorities for the role have changed due to the crisis.

Get smart before the start

Leaders can use the period before their start date to learn as much as possible about the business. From the comfort of home, the onboarding executive can study key documents, including the strategic plan; competitive assessment; financial documents; attitude and usage (A&U)/consumer segmentation analysis; brand/product/portfolio evaluation; customer/channel information; annual operating plans; metrics the team uses to evaluate performance; and other relevant role-specific materials. This is also a rare “unbiased” moment to absorb what the external world thinks about the company and brand. Spend time reading, listening, learning and being a consumer/customer to build your external perspective. Finally, leaders may also want to review any feedback and observations from the interview process to inform the transition plan and reflect on past transitions to consider what they wish they had done when onboarding themselves or others.

Align on desired outcomes

A new leader should have a very clear picture of what success looks like for the first 100 days, the first year and the first three years. This puts to work Stephen Covey’s principle “Begin with the end in mind.”

If not overtly spelled out in the position specification, the CEO or hiring executive should document and review these expectations with the new leader. The outcomes should be measurable, and the list finite (three to five major outcomes, not a laundry list). In the heat of the battle, an executive can use this direction to prioritize and sequence the jobs to be done. Leaders transitioning in the current climate should push for an explicit conversation with their boss or the board about how the context and priorities for the role have changed due to the crisis. Have there been layoffs? Are people feeling too stretched, or do they have too much time on their hands? Does the crisis make it possible to accelerate planned changes to certain processes or ways of working?

Make introductions

Building and coalescing a strong team will be critical to a leader’s success. Direct reports are arguably the most important cohort to the onboarding executive. This is the team that will collaborate and lead together, potentially for many years to come. The team understandably will be eager to get to know their new leader; for this reason, it’s best to hold a group videoconference between the onboarding executive and the team before an introduction is made to the broader team and company. The CEO or hiring executive should make a very brief appearance to make mutual introductions, then leave the onboarding leader and the team to spend an hour simply getting to know each other. Ideally, this initial meeting would occur outside the workplace, typically over a dinner; however, in the COVID environment, a videoconference is the best alternative. Schedule it to ensure 100 percent attendance.

Following the introduction to the leader's direct team, plan a more formal introduction of the onboarding executive to the broader team or organization. The hiring executive should kick off the videoconference to set the context and introduce the new leader, articulating why the new executive was hired and how he or she will contribute to the success of the business. The onboarding executive should be prepared to talk about themselves personally (as appropriate given the culture and region) and professionally. This is the all-important "first impression." The new leader has an opportunity to control the narrative of their arrival, who they are, how they like to work with others and reiterate the desired outcomes to reinforce alignment.

Align the team

One-on-one conversations with team members are the next step in relationship-building with the direct report team. As these initial meetings are likely to occur over video, you will miss out on some of the natural small talk that occurs when meeting in person — offers of coffee, comments about a photo or other element of the surroundings. To put people at ease, consciously take a few minutes at the start of these discussions for a personal warm-up, and to show your humanity. You might also send in advance a list of "listening" questions, for example: how long have you been with the company and what have you seen change in that time?; what do you like about working here, what motivates you to come to work every day?; what would you like to see changed?; tell me about your role and your team's role in helping the company achieve its goals?; what do you think I should focus on in the first three months?

Because interactions are not in person, we would recommend weekly sessions with direct reports for the first month or two, eventually deciding mutually on the appropriate cadence of communication, which may differ depending on the individual and role. Initial meetings might be focused on deeper "how to work together" conversations, followed by a people/team review, business priorities and specific short- and mid-term deliverables. New leaders also should get to know members of their team informally. Periodically check in on them. Show an interest in them as people. Over time, new leaders will develop a perspective on the capabilities of the team and its capacity to deliver against the strategic priorities of the business.

In parallel to building one-on-one relationships, the onboarding executive should begin the work of creating a high-performing team. The first step is to start building trust among the team. Psychometric tools (Spencer Stuart uses our Individual Style Profile and Culture Framework) can help teams learn more about one another and individuals' preferred ways of working, which can enhance mutual understanding and help build trust. This work can take place during a half-day workshop, which can be done virtually.



Meet with stakeholders

The onboarding leader should seek guidance from an internal sponsor about who the key stakeholders are and how to engage with them effectively. Without a deliberate strategy for meeting and developing relationships with board directors, colleagues on the management team and other internal and external stakeholders, new leaders may find that they have less influence than they expect. A mapping exercise can be very helpful in developing communication strategies for different stakeholders depending on their respective motivations and the kind of interactions needed (e.g., whether someone is an influencer or just needs to be kept up to date).

It's incumbent on the onboarding executive to initiate conversations with his or her new peers and demonstrate curiosity and interest in their issues and concerns. Conversations should be aimed at understanding shared points of view, where one leader's responsibilities overlap with another's and where others are looking for support. Check in with key stakeholders regularly, and perhaps more formally at mid-year and year-end.

Take advantage of technology to extend your reach. Perhaps the greatest advantage of the tech-enabled onboarding program is the opportunity to make virtual visits to all key internal offices and customers around the world in a more condensed time frame. The new leader should become an early adopter of communication tools and drive the use of technology like video that most closely recreates a face-to-face experience.

Get a read on the culture

With most people working virtually or in different locations, it will be harder for the new leader to pick up on the unwritten cultural rules of the team and organization. Debriefing after meetings or making quick one-on-one calls after an important group discussion will help the new leader get a read on the culture. Over time, the onboarding executive ideally will identify a trusted person who can provide guidance on the cultural norms, using this information to inform communication and interactions.

Companies can help the onboarding executive by defining the characteristics of the organizational and team cultures, articulating how the individual's strengths complement the culture and flagging how certain actions could be perceived negatively by others. Spencer Stuart uses a proprietary culture framework to compare leaders' styles to the company culture. New leaders can use that information during their transition to understand the key attributes of the culture and how their style may be viewed by others. Often, just understanding the key elements of the culture can make a tremendous difference in an executive's ability to be successful.

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Hone your leadership style

A new executive's transition plan should consider his or her personal style, potential blind spots and ongoing development needs within the context of the organization and team. Depending on the new context, the onboarding leader may consciously have to adjust their style or habits that may impact how they are perceived in the organization. Effective leaders are self-aware and reflective about the signals they may be sending.

It is especially important to be aware of how you show up in the virtual world to make sure your messaging and behavior align. Be mindful of your communication style, tone and articulation as people will be less able to read your non-verbal cues, even on video.

Reviewing feedback from your assessment or the hiring process, including findings from interviews and references, is a great way to remind yourself of the developmental areas you may need to work on. These could include potential leadership style "watch outs," capabilities you need to build or biases you may bring from past roles. Keep a journal of your ideas, reactions and emotions during the first 100 days, and seek feedback.

Although not appropriate at every level of the organization, our ideal onboarding experience would include three to six months of coaching. A certified coach who has been briefed on the executive's career history, current mandate and professional development plan can serve as a sounding board and objective adviser during the executive's early tenure. Many executives think that coaching is remedial, but no professional athlete would dream of competing without a coach; why would a top business leader think differently?

These onboarding steps will build on each other, enhancing your ability to develop critical relationships and get off to a strong start in a challenging environment. As businesses and governments make decisions to lift current social distancing and work-from-home restrictions, each of these onboarding steps should be revisited with an open mind to repeating some of these activities in a traditional face-to-face environment.

Checklist for the New Leader

Team

- » Increase the frequency of your communication and messaging through all available channels.
- » Remember, your words are powerful. Ensure communication is deliberate and non-ambiguous.
- » Create rapport in team meetings by starting with a personal check-in and sharing your experiences; be authentic.
- » Identify opportunities for the team to collaborate and engage with each other and across functions. When hosting weekly town halls, provide the opportunity for questions so that employees feel heard.
- » Encourage informal virtual interactions (coffee, lunch, happy hours, etc.) and join as a guest where appropriate.

Stakeholders

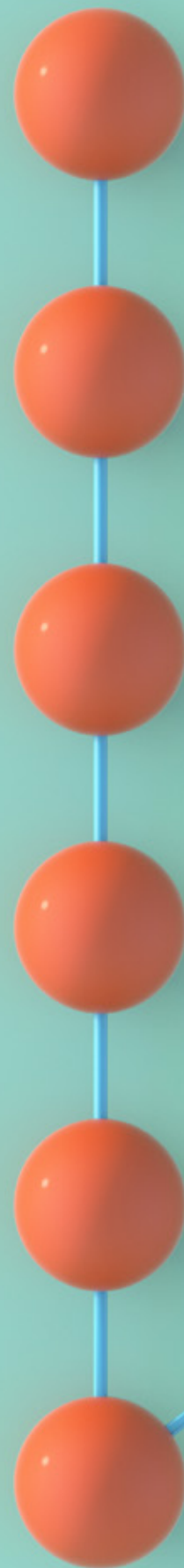
- » Seek guidance from an internal sponsor on who your stakeholders are and plan how to engage with them effectively.
- » Communicate a plan for regular contact.
- » Be explicit in your actions and increase your efforts to communicate progress and provide updates.


Culture

- » Identify a trusted internal member who can provide guidance on the cultural norms — be sensitive to these and use them to inform your communication.
- » Alleviate anxiety around new working practices; ensure clear expectations around performance and what needs to be achieved.

Leadership style

- » Be aware of how you show-up in the virtual world — ensure alignment between your messaging and your behavior.
- » Be open and honest in what and how you communicate — and communicate key messages with impact.
- » Show and express understanding regarding the new work environment — ask questions, offer support.
- » Put time aside for your own well-being and encourage others to do the same.





Checklist for the Hiring Executive and Organization

Communication

- » Connect ahead of the start date to help with expectations and day-one nerves. Encourage others to reach out to the new executive ahead of their start to welcome the new leader and serve as a resource.
- » Communicate even more than you might in person, formally and informally.
- » Encourage informal get-togethers, such as virtual coffee dates, to help the new leader build connections and orient to the workflow.
- » Manage expectations and help the new leader keep the challenges in perspective.

Onboarding programs

- » Explicitly schedule and hold onboarding programs, group discussions, Q&As and training sessions by videoconference — don't just expect the leader to "figure it out" on their own.
- » Communicate the onboarding program ahead of the official start date.

Technology

- » Ensure the setup and availability of technology (laptop, phones, etc.) ahead of the start date — using videoconference to support setups and downloads.
- » Arrange to have a go-to person to help when technology is not working.

A few final considerations

- » It will be more challenging for the new executive to pick up on the cultural norms virtually. Consider assigning a "culture buddy" to help the onboarding leader figure out the company's communication norms, video meeting etiquette and level of formality in areas such as dress code.
- » Be mindful of the new leader's personal and home working circumstances.
- » Do not assume you can just take the company's "normal" onboarding program and put it to video. It will need to be redesigned for the current context.

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ABOUT SPENCER STUART

At Spencer Stuart, we know how much leadership matters. We are trusted by organizations around the world to help them make the senior-level leadership decisions that have a lasting impact on their enterprises. Through our executive search, board and leadership advisory services, we help build and enhance high-performing teams for select clients ranging from major multinationals to emerging companies to nonprofit institutions.

Privately held since 1956, we focus on delivering knowledge, insight and results through the collaborative efforts of a team of experts — now spanning more than 70 offices, over 30 countries and more than 50 practice specialties. Boards and leaders consistently turn to Spencer Stuart to help address their evolving leadership needs in areas such as senior-level executive search, board recruitment, board effectiveness, succession planning, in-depth senior management assessment, employee engagement and many other facets of culture and organizational effectiveness. For more information on Spencer Stuart, please visit www.spencerstuart.com.

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