

CJWA

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Building the New Team **Transition Management for Leaders**

Overview

The challenges associated with being promoted from within, or recruited to take over a key leadership role, are often left to the executive alone to determine how to succeed. A number of companies now realize how important it is to invest in making sure these executives succeed!

Recruiting leaders is expensive and much more costly when a leader fails. It is particularly challenging to join a firm where the culture and norms are very different from the organization he or she has come from. Also challenging is being promoted from within to manage former peers. The transition management process assists the new leader by gathering critical information from the new leader's supervisor and from key members of the team.

The consulting involves a series of interviews with the outgoing manager (when appropriate), the new leader, key direct reports and possibly the new leader's manager. This information is used to create dialog with the team and the new leader that leads to clarity of vision and understanding of goals, roles, accountabilities and leadership style.

A successful transition maximizes leadership efficiency and effectiveness. It quickly alerts the new leader to the needs, expectations, strengths, concerns and weaknesses of the operation and its key staff resulting in minimum downtime and a clear and accurate sense of priorities.

Cost Benefit Analysis

New leaders report that the consulting process offers a generous return on investment. The few days spent gathering data, followed by dialog and team building, dramatically improves how quickly they learn what is happening and what needs to happen. The process identifies priorities and existing land mines with recommendations on how to deal with them. It helps leaders streamline communications and come to terms quickly about key personnel decisions. New leaders often cite that what they learn in a few days, in other situations, has taken them six to nine months to discover. By highlighting hopes, wishes and concerns, the process increases the ability of the leader and team to quickly communicate and manage expectations.

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Building the New Team

Considering that the average range for replacing a worker or a senior manager can be from \$10,000 to \$150,000, the workshop typically generates an extremely attractive return on investment. Organizations who have institutionalized this process report a greater rate of retention and effectiveness of newly hired and promoted leaders.

Background and Process

The idea for a transitional workshop comes from a process developed at Kaiser Aluminum (circa 1976). The thrust is to **significantly** reduce the usual time required for a manager to become effective on a new job. The standard process begins with data collection through a series of interviews. The first interview is with the incoming manager. The incoming manager decides if he wants his or her own manager to be interviewed and whether it is worthwhile to interview the outgoing manager. Additional interviews are conducted with the incoming manager's direct reports and occasionally key customers and other key members of the new manager's organization.

The number and nature of the interviews are tailored to meet the immediate and long-term needs of the new manager. The following questions are typically a starting point for a discussion between one of our consultants and the new manager. The questions might be different depending upon who is to be interviewed. These questions are agreed to ahead of time by the new leader and the consultant who will be doing the interviews.

Sample Questions about the Company

- What is your vision for the overall company and for your part of the organization?
- To help achieve your vision for the company, what is necessary in the next six to nine months?
- What strengths does your department(s) have that will help you accomplish the company's goals?
- What issues or obstacles concern you?

Building the New Team

Sample Questions about Senior Leadership

- What did you value about the last leader's leadership style?
 - What would you like to see continued?
 - What would you like to see stopped?
 - What would you like to see started that wasn't being done?
 - What was done that you would like to see more frequently?
 - What would you like to see continued, but done less frequently?
- What advice can you share that will help the new leader be successful?
- Overall what seems to be getting better, worse or standing still?

The data gathered is analyzed and presented in summary form to the new manager with recommendations. The recommendations typically include a one day workshop for the new manager to address the opportunities and issues identified. This facilitated workshop is designed to create meaningful dialogue between the new leader and key department members. Its aim is to reduce any possible negative impact of change on personnel and systems and to minimize organizational "downtime" that normally occurs when there is a new leader. The benefits include a clear understanding of leadership issues, thought provoking ideas, hopes and concerns of all involved.

Typically the interviews, analysis, meetings and the workshop take about three to four days total.