

# MOR Associates *Leadership Lessons*

## Taking On a New Role



*By Brian McDonald*



Brian McDonald is President of MOR Associates, which he founded in 1983 to assist clients in developing strategies designed to elicit the contributions employees want to make to enhance the success of their enterprise.

Brian has focused his practice on developing leaders, enhancing strategic thinking and consulting on continuous improvement efforts.

Brian's has developed and facilitating a number of successful and ongoing leadership programs for MIT, Stanford, Penn, Indiana University, and many others.

Brian is a key contributor to the expert survey services MOR Associates offers as part of its continuous improvement portfolio.

### So, You're In a New Role, Perhaps In a New Environment...

When you assume a new role, whether in a new environment or a familiar one, there are always questions about how to begin. You feel pressure from yourself, from individuals in your new organization as well as from those who placed you in your new role: What are you going to do? How will you change the organization? How do you get started learning about your new responsibilities? Who are the key players in the organization? Who are your key stakeholders? What are your priorities? How long do you have to get an action plan in place? Questions, questions, questions. And you will receive much advice as to how you should proceed in every area. Some of the advice will be helpful, some not; there will be broad consensus in some comments you hear, and stark divergence in others.

Here are seven things that you may find helpful as you get started:

#### 1. Share Broad Themes Early

Some of the first questions you will have will be about the vision and priorities you have for your new responsibilities. People want to know what you think is important. And, given our individual desires to be open and helpful, it is very tempting to answer these questions with specifics in your quest to give these colleagues insight on where you think this organization needs to go. In most cases (though not all), you will be better served by answering these queries with broad statements rather than a list of specifics.

Unless your new role is in a turnaround situation which has considerable urgency, it is likely to be more appropriate to share those important themes you believe describe the issues that need to be addressed and aspirations that need to be pursued.

Your objective is not to be evasive but rather to recognize that you are new to this responsibility. As such, you will be listening and learning before you become specific in outlining your "change agenda." The process you use to learn about the organization needs to be inclusive (see later) so when you do share the priorities, they will reflect input from the entire organization. When the new superintendent of the Boston public school system was asked, what was the first thing she was going to do upon arriving in this new role from Memphis, she wisely responded, "I'm going to hit the ground listening."

#### **Actions to be taken:**

- a. Develop a small number of talking points to use in your conversations and presentations. These should be those broad themes and aspirations that you believe will be the focus of your work. State these in a way so that people can relate to them.

## 2. Read the Landscape

When you arrive in a new role, no matter whether in an organization new to you or in a new role in an organization where you have worked, you have a one-time opportunity to assess the organization from your new perspective. In most organizations it will be important for you to take this opportunity and learn the landscape associated with your new responsibilities before you declare your priorities.

It is tempting to take the assumptions you operated on in the past and think these apply in your new role. That is unlikely to be the case. Organizational culture is subtle. At the end of the day, learning about the culture will be instructive. Expanding your understanding of the culture will help guide you as you start setting goals and strategy.

### **Actions to be taken:**

a. As you meet with people, ask questions such as:

- What do I need to know?
- How do you get things done here?
- Can you tell me about the culture here?
- What are the unwritten rules?
- Who are some key people to get to know?

---

b. Listen to what people share and sketch out the culture you hear individuals describing.

You would be wise to avoid offending people by suggesting early on, “We need to change the culture here.” Many a new leader will make this observation that the culture needs to change or that we are stuck in the past. Comments along these lines, though understandable, can cost you considerable capital or good will early on.

---

c. “Honor the room.”

It will be helpful to respect the past as many people in the organization take pride in what they did as a member of this organization. It makes little or no sense to criticize or blame the current culture or make the culture the culprit. Even if part of the problem relates to the culture, why take it on? It is far better to identify the behaviors or the norms you hope to put in place rather than reflecting negatively on the culture.

### 3. Build Relationships

Relationships are a key to success in any organization. Developing relationships early on allows you to create a rapport with people with whom you may want or need to collaborate at a later time. Given that you will want to focus on some new priorities or need to lead some significant changes that are important to the future, how will you engage and enroll people in going there with you?

There are four steps in building relationships:

- Initiate – For communication to occur, someone has to take the first step.
- Inquire – Express a genuine interest in learning about the other person, and gaining new information and perspective about the individual, their role and organization, etc. What is important to him or her?
- Invest – Once you have initiated a relationship, you have to invest in maintaining the connection for it to mean something .
- Influence – People who have relationships naturally influence each other.

Relationships are like currency. They can enable you to get things done.

**Actions to be taken:**

a. Make a list of people with whom you need to develop relationships. While this list may be short when you start, you will want to add names to it as you talk with people across your organization and those external to it. You might begin with your direct reports and the key work groups in your area. From that beginning, you will want to add key clients, partners and stakeholders.

---

b. Set up meetings to meet with people beginning with your direct reports. You don't have to meet with everyone at once, though be deliberate about making progress.

---

c. In your meetings, ask questions: "What do you do?" "What do you like to do?" "What were a couple of accomplishments you contributed to last year?" Explore what works well, what doesn't work so well. You might also ask what your organization does well or doesn't do well from their perspective? What opportunities do they see? What concerns do they have? Who should I be talking to? Through your meetings, create connections with key people you'll depend on to get things done within your organization.

**4. Create a SWOT Profile**

During your initial meetings and interviews, people will tell you more than you want to know. You will hear about what works, more about what doesn't work; about who works or doesn't; what people expect you to do, and not do. You'll get information that matters to you as well as information far afield from your responsibilities. The people you meet and the conversations you have early on are likely to provide much valuable information relevant to your new role. So, why not take notes and sort it into a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis that has more value than a passing comment?

<b>Strengths</b>	<b>Opportunities</b>
<b>Weaknesses</b>	<b>Threats</b>

You can use the SWOT later when you engage various audiences in addressing the priorities and needs. You can indicate that this assessment is more than just your critique; it came from the group during your listening and learning interview loop.

**Actions to be taken:**

- a. Take notes during your meetings, trying to capture the speaker's words on matters of import to your organization.
 

---
- b. Organize these notes by sorting the comments into four categories:
  - What are some strengths we have as an organization? How might we build on these?
  - What are some weaknesses we have as an organization? What might we do to minimize or eliminate these?
  - What are some opportunities (external to our organization) that we might pursue? What are the external trends and forces that are likely to shape our future?
  - What are some threats we need to acknowledge? How might we address these concerns?

(You may find it helpful to keep one summary and add to it after each of your meetings. That way all of your notes on the same item in a category will be in the same place.)

---
- c. From time to time review your summary and use it to shape questions for future discussions.

## 5. Assess the Talent Needed to Get the Job Done

Any new leader will need to assess the people with whom they will be working. Do you have the talent you need to accomplish the agenda you want to pursue? You have certain strengths. Do you have others on staff that will compliment the skills, abilities and attitude needed to be successful?

What can you do to enhance the current capability or to recruit the talent you need?

Many leaders wished they had moved sooner to address some of the personnel concerns they observed early on. You can't do this job alone.

### **Actions to be taken:**

a. As you meet with people in your organization, take a measure of their capabilities. What is their role? How do they approach it? What are the critical skills this person has? What might be missing? What about the people in this individual's organization? (While you may not get a solid initial picture in your first discussion, this is an area that you will mentally revisit in every interaction you have with a staff member in your organization.)

b. Before 3 months into your new role, review your direct reports and have frank conversations with each as to your expectations and their development needs.

*-continued*

## 6. Get Briefed On the Finances

It is important to understand your organization's finances—the budget, revenue sources, expenditures, trends both good and bad and where you have discretion within the prescribed financial construct. Your ability to use these resources or to reallocate funds may be a critical part of your strategy so you will want to get up to speed on this as early as possible.

**Actions to be taken:**

a. Within the first two weeks in your new role schedule a first briefing on the organization's finances. Do sufficient due diligence so that you can identify any concerns within the first 30 days.

---

b. Should there be spending issues or revenue concerns, flag these in your discussions with those to whom you report. These could be issues that you are inheriting or patterns that you expect to become a problem in the future. In some cases, it may even be useful to request an informal external review or audit, especially if you have any concerns about the appropriateness of what has occurred.

---

c. Look for opportunities to leverage revenue sources.

*-continued*

## 7. Sketch Out Priorities For First 3 to 12 months

You have now done your homework. You have studied the organization, listened to people, assessed the resources and come to appreciate the culture and concerns people have. It is time to lay out the initial priorities for your work.

### **Actions to be taken:**

a. What are the important priorities you believe need to be addressed? This is likely to be a long list.

---

b. Take your long list, think about how you can summarize and shorten this list so that there are no more than 3-5 important issues you want to focus people on. Don't overwhelm people with too many items. Focus. This is not your last time to put your priorities before the organization.

---

c. The next step is to communicate these initial priorities to your organization (and your management) before your "newness" wears off. So, the question: How can you communicate these initial priorities in a compelling way? Chip Heath (professor of organizational behavior in the Graduate School of Business at Stanford University) and Dan Heath (consultant at Duke Corporate Education) in their book, *Made to Stick*, suggest a simple formula...

*-continued*

<b>SUCCES</b>	
<b>S</b> imple	Keep it simple, focus on the core idea.
<b>U</b> nexpected	Make it memorable. Our audience has expectations about how we will express our idea. To gain and retain their interest we often have to violate their expectations.
<b>C</b> oncrete	Use a tangible example. Present the idea in terms of human actions, in terms of sensory information. Sticky ideas are full of concrete images.
<b>C</b> redible	These priorities need to resonate with people. The most credible ideas carry along a credibility self-test that the hearer can use to test the idea's credibility.
<b>E</b> motion	Stories serve to encourage people to act on our idea. They multiply experiences, provide examples of how they might act, and enable us to envision ourselves in action.
<b>S</b> torytelling	Stories serve to encourage people to act on our idea. They multiply experiences, provide examples of how they might act, and enable us to envision ourselves in action.

Using this approach to communicate the direction and the priorities will help you enroll people in creating the desired future you and others believe will enhance the likelihood of success for this organization. As you demonstrate a genuine interest in what people have to say and as you outline the desired direction and accomplish some early initiatives your credibility may be enhanced and this will serve you and your organization well.

### Conclusion and Summary

Taking on a new role can be invigorating. The chance to start anew is an intriguing chance to write an exciting new chapter with you doing your very best work to date. Thinking through your entry strategy and avoiding some early mistakes will increase the likelihood you get started on a positive note that strengthens your credibility and your capital.

1. Share Broad Themes Early
2. Read the Landscape
3. Build Relationships
4. Create a SWOT Profile
5. Assess the Talent Needed to Get the Job Done
6. Get Briefed On the Finances
7. Sketch Out Priorities For First 3 to 12 months