THE KORN/FERRY INSTITUTE

Talent management best practice series

Executive onboarding

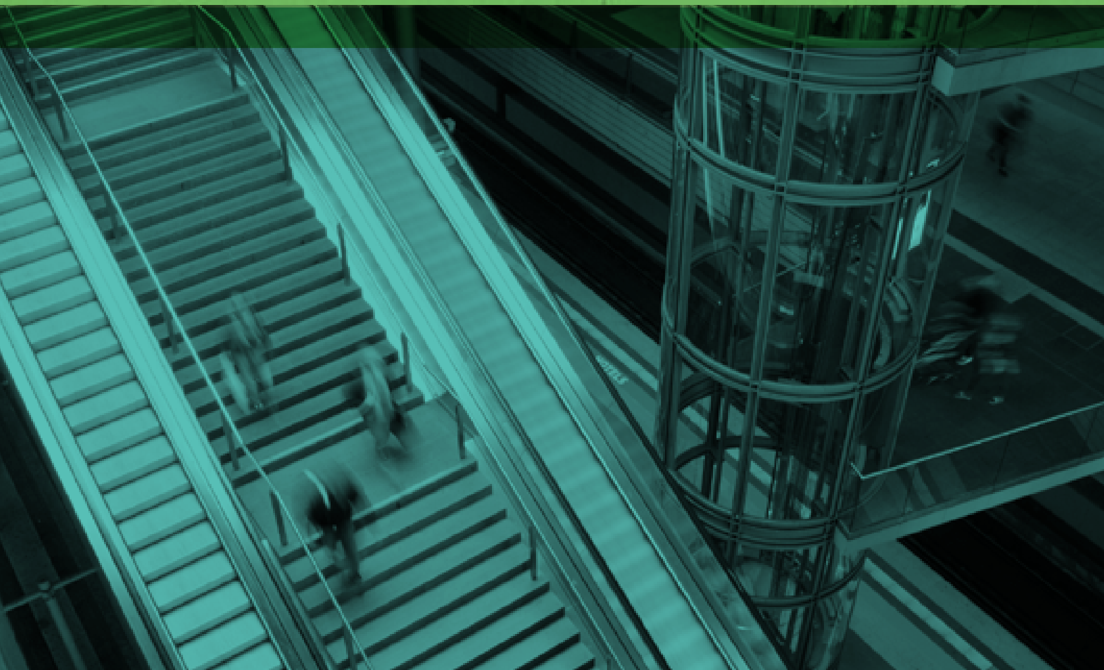

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Table of contents

Foreword

The Korn/Ferry Institute Best Practice Series provides a window into the thought leadership and expertise that Korn/Ferry International offers as the premier global provider of talent management solutions. Each installation of the series covers a key area of talent management and captures Korn/Ferry's science, philosophy, and approach. These best practice books provide an introduction to who Korn/Ferry thought leaders are, what Korn/Ferry does best, and how Korn/Ferry can fuel organizations' success in meeting their strategic talent management needs.

Korn/Ferry's approach is based on science and informed by what works in practice. The Korn/Ferry Institute Best Practice Series is intended to summarize key, unique points of view held by Korn/Ferry thought leaders that inform our methods and approach to strategic talent management. Consider it a way to spark new thinking and get to know what Korn/Ferry offers.

Introduction

Executive transitions, when effective, build capability for people and for organizations. Executives get a new assignment that can build and broaden their experience. Organizations get new leadership to energize the company and advance the strategy. Boards fulfill their succession and governance responsibility.

There is a lot at stake when executives transition. The business case for successful onboarding is clear. Executives are taking bigger jobs sooner in their careers. And, 40 percent of executives in new roles fail within the first eighteen months[1]. Combine these factors with the cost of executive turnover (some estimates put it at $2.7 million USD per executive[2]) and the failure to successfully bring executives into new roles becomes a major and costly issue that a company must address.

There are many possible causes of this undesirable turnover including a lack of alignment on the role and expectations, a failure to build key relationships, or a failure to demonstrate results. Korn/Ferry has studied the elements that contribute to individuals' success and failure in new roles and has developed a clear point of view on what type of support and guidance is critical during this time of transition.

Onboarding as a concept has become somewhat diluted over the years. What do we at Korn/Ferry mean when we talk about onboarding?

For some organizations, onboarding means making logistical arrangements for new employees' first day. Ensuring that they have a computer, a work space, a phone number. Other organizations may think of onboarding as new employee orientation. Something run by the training department to ensure that paperwork is filled out, key information about the history of the company is shared, and knowledge related to company values and expectations is articulated. Other companies may think of onboarding as the process of orienting new employees to their surroundings and context. Introducing them to the people, products, services, policies, and procedures related to their job. All of these types of onboarding are essential for employees to make a smooth transition, to feel welcome, and to begin contributing.

Korn/Ferry's approach to onboarding is focused on helping people successfully transition into new roles and possibly new organizations. Whether it's an internal promotion or an external hire, people filling new roles have a lot of contextual clues to consider that will help them hit the ground running and avoid missteps.

All of Korn/Ferry's onboarding work is done with an eye on accelerating and optimizing a new placement's transition in a way that ensures career success on the part of the placement, and provides a healthy return on investment on the part of the company. The assumption is that the organizations we work with have new employee orientation and integration efforts handled. These are important tasks that can be somewhat systematized and become brand extensions for companies. It's the more ambiguous, fluctuating, nuanced side of transitioning people into new environments that has become the focus of Korn/Ferry's expertise in onboarding. What are the key stakeholder relationships? How change ready is the culture? Are the company's and the individual's expectations for the role aligned?

Even with the right leadership characteristics and style in place, no leader operates in a vacuum. This is why onboarding is an essential continuation of the placement process. The key to executive transition is unlocking a leader's strengths and mitigating weaknesses within the organizational context.

Granted, as a global executive search firm, Korn/Ferry also specializes in finding the right talent for the role. Korn/Ferry involves many experts in defining the requirements of the role, sourcing the best possible talent pool, assessing and interviewing the slate of candidates, and presenting the cream of the crop to the organization.

So, why would such a focus on onboarding be necessary? Because even with the right leadership characteristics and style in place, no leader operates in a vacuum. This is why onboarding is an essential continuation of the placement process. The key to onboarding is unlocking a leader's strengths and mitigating weaknesses within the organizational context. And this is where Korn/Ferry's approach to onboarding differs from a typical executive coaching engagement.

Many consulting firms approach onboarding as coaching and it's not. In a coaching engagement, the focus is on development. Development includes finding the strengths and weaknesses of a leader, working on building self-awareness, exploring ways to optimize the strengths, shore up weaknesses, and create a path for sustainable personal transformation. Using coaching in place of onboarding can help an individual work on weaknesses, but the improvements made may have no bearing on being more effective in the immediate context that individual is entering.

Onboarding, on the other hand, is less focused on the individual's development needs and more focused on the individual/role/organization fit. By fit, we mean the match between what the organization needs and what the placement can uniquely offer. Above all, a commitment to invest in the onboarding process is an acknowledgement on the part of the individual that he or she is moving into a situation where fit matters.

The onboarding process is designed to provide key insight related to which of the individual's leadership characteristics will help and where they might hurt chances for success in the new context. That is the basis for moving forward because it sheds light on what leadership qualities to highlight and lean upon, and which qualities will need to be dialed back or mitigated in order to be successful in the new situation.

In this way, onboarding becomes a point on the talent management continuum, strategically placed between selection and development. The knowledge gained about the candidate's style, strengths, weaknesses, and leadership qualities gathered in the interviewing and selection process provides useful context in the onboarding conversation. Onboarding focuses on gathering situational data from the organization and key stakeholders – who, what, why, expectations, historical context, track records, etc. Ruminating on these two camps of data (the individual and the organization) provides useful insight on how to best facilitate and optimize the match. Subsequently, the discoveries made in the onboarding phase can be fed into the development planning phase to ensure ongoing, long-term personal and career development for the placement.

In the following pages, we explore a few of the unique points of view Korn/Ferry holds regarding how critical the onboarding phase is to an executive's success and how to optimize the unique opportunities it offers.

What the research says

Researchers have spent a lot of effort trying to understand where new leaders are most likely to trip up – particularly in the onboarding phase. Ten key areas have been identified as having the potential to derail new executives even before they get through their honeymoon period.

Top ten potential onboarding problems:

1. **Falling behind the learning curve.** This can be due to not using time effectively prior to the start date, or in the early days on the job. A less than adequate understanding of the situation, customers, key business partners, organizational capabilities, or market conditions can impede a new executive's transition.[3]

2. **Becoming isolated.** Executives can get into the trap of thinking they need to be self-sufficient. In the early days especially, that is not the case. This is a time for building relationships and discovering interdependencies.[4]

3. **Coming in with the answer.** Arrogance is a known career staller. But sometimes arrogance is rooted in insecurity. When new executives feel that they have to act the part, have all the answers, appear decisive, and establish a directive tone, these behaviors can be counterproductive.[5]

4. **Sticking with the existing (and underperforming) team too long.** When new executives give the existing team members too many chances, they risk losing credibility in the eyes of the A players. Failure to build a high-performing team and deliver results quickly enough can be difficult to recover from.[6]

5. **Attempting too much.** In an effort to prove that they can handle multiple simultaneous challenges, new executives may end up looking foolish or burning out.[5]

6. **Getting captured by the wrong people.** Those with power and influence want to maintain their power and influence. New executives need to be mindful that there will be many people seeking to exert their pull in this new world order.[6]

7. **Falling prey to the success syndrome.** Whether the predecessor is still with the company or not, his or her shadow may loom large over the new executive. We will discuss this in greater depth later on.[1]

8. **Not recognizing novelty.** Not seeing or reacting to changes in their situation can cause new executives to rely on old tricks.[7]

9. **Lack of alignment.** The job specs that were documented and communicated as part of the search process are not the same as the expectations held in people's minds. Different stakeholders and team members can view the new executive's role very differently.[8]

10. **Lack of a winning strategy.** If a new executive can't bring an effective strategy to the business and see it through—whether due to a mismatch in skill or vision—that executive will not be effective in his or her role.[1,9]

Insurance policy for executive transition

"Human beings are overconfidence machines," wrote *New York Times* columnist David Brooks. Most executives asked to estimate the accuracy of their knowledge of their own industries overestimated their success. A *Businessweek* poll reported that 90 percent of executives believe themselves to be in the top 10 percent of leaders. Flawed self assessments are evident all the way up the corporate ladder, with CEOs displaying overconfidence particularly when entering new projects or markets. We're attracted to confident leaders. But their confidence also coincidentally increases the chances they will derail after taking a new role.

Much of what contributes to executives' confidence is the tremendous amount of experience and skills they have accrued throughout their career. Strategic skills, ability to manage people, industry knowledge – all of these will be assets in the new role. But it's important to consider the knowledge that will not transfer into a new company or a new role. Things such as relationships, ability to navigate the culture, understanding the role and

Onboarding the organization

It's common these days for organizations to approach development and career-pathing as a joint responsibility between the company and the individual. In fact, most companies these days highlight a 51 percent/49 percent split and will say that it is primarily the employee's responsibility. Onboarding is no different. For onboarding to work, both the placement and the company have to take proactive roles in communicating, adapting, and getting ready for change.

One exception to this is when placements are selected for their star status. Rather than looking for new leaders to adapt and be agile as they enter the new environment, these are cases in which organizations choose executives based on their track record. They want them to do what they've done before. In these cases, the onboarding should be more focused on preparing the organization for the new placement and accommodating what he or she needs in order to get the kind of results or institute the type of change that is part of his or her brand. The organizations knows what they are getting and they are signing up for it. Although it is still helpful for the placement to help the organization adjust to new ideas and goals, it becomes less about the individual adapting and more about the organization making room. Indeed, this is a rare onboarding situation, but one that's worth pointing out. It will be important to identify it so that the change agent can deliver on what was promised in the selection process.

how the team operates. These are areas in which executives must start from scratch because their knowledge of the organization will be limited – no matter how effective the executives' due diligence.[10] It's just a reality that the new executive will be getting to know new people, taking in the culture of the new group, and building an understanding of how the new role interfaces with other roles. Knowing where similarity ends and uniqueness begins requires a high level of awareness and sophistication. Onboarding can assist with this analysis and enable leaders to recognize where their past experience is directly applicable and where it is not.

Korn/Ferry's best practices

Korn/Ferry recognizes that when a company selects a new executive, that company is also selecting a strategic direction. A candidate's strengths and experiences often indicate the direction he or she would take in the new role. For example, a candidate more rooted in general management might focus on shoring up the company's balance sheet, whereas a candidate who has a distinguished career in managing innovation might focus more on strategic vision.

Because executive placement is a complex, nuanced, and individualized process, it makes sense for the approach to executive transition to be customized to the situation. Onboarding at the executive level is not a one-size-fits-all approach. There is no recipe to follow, no step-by-step guide. Rather, it requires a deep assessment and understanding of both the organization and the new executive in order to build the most appropriate onboarding plan.

Korn/Ferry's research and experience suggest that there are several factors that should be considered and incorporated into the design of the onboarding process. These can help determine a new executive's success. These eight insights inform Korn/Ferry's thoughtful, strategic approach to the onboarding process. Each of these insights will be expanded upon for your consideration.

1. **Managing first impressions** – Transition can overwhelm and overload people. Keeping attention focused on what's most important helps build positive first impressions.

2. **Navigating the transition paradox** – Career success brings confidence. But an executive who is overly confident may underestimate the novelty and complexity of challenges in a new role.

3. **Optimizing the leadership moment** – All eyes are on a new leader. There is a window of opportunity to seize when a leader commands that kind of attention.

4. **Conducting a situational analysis** – Set leaders up for success by bringing to light perceptions, assumptions, misalignment, and areas that require more attention and clarity.

5. **Introducing change, with all due respect** – It's much easier for a leader to orchestrate change when there is a healthy dose of respect for the organization.

6. **Breaking the predecessor's mold** – The imprint of predecessors lingers long after a leader moves into a new role. Leaders need to make the role their own.

7. **Agile leader, agile organization** – Handling the transition plan of a highly agile leader joining a less agile organization requires a very different approach from when agility levels are a match.

8. **Maintaining a global perspective** – What works here may or may not work over there. As in all things, it pays to keep a global mindset when planning for executive transitions.

Managing first impressions

Almost one third of executives decide whether they are going to stay or leave their job within the first week. When onboarding a new executive or employee, there are two primary factors driving a smooth transition: the executive's first impressions of the company, and the company's first impressions of the executive. The situation could be perfect – great company, talented executive – but if the judgments made at first blush are negative ones, it can be difficult for either party to overcome. Cognitive psychologists like Daniel Kahneman have found that when people are on overload (experiencing a lot of novelty and change), they tend to rely more on intuition and heuristics (short cuts). Unfortunately, these backups to attentive, rational thinking are faulty and can result in poor judgment. In order to avoid leaving the executive or the company with the wrong impression, it is important to be purposeful and attentive in the onboarding process.

Experiencing cognitive overload and excessive workload is a reality that seems here to stay for most corporate executives. One key to success for the onboarding process will be protecting the time and space required to make purposeful, thoughtful introductions to people, strategy, and processes. In some cases executives are barraged with numerous large files in the weeks before they begin employment, expected to review and commit to memory strategies and operating procedures. Granted, there may be many things to cover on “Day Zero” (meaning before the executive begins the job) but companies should bear in mind that an avalanche of material without careful thought and context given to it can serve to overwhelm, inundate, and push the executive to get into the weeds too soon. Deliberate design of the onboarding process is essential to direct the executive’s attention to the important things that will determine a meaningful, long-term contribution to the company.

The precise set of things to pay attention to will differ by situation, of course. Upon selection and placement of a candidate, it is strongly recommended that there be a situational analysis conducted to understand the specific environment and fit considerations that will maximize the mutual benefit for executive and company. Think about engaged couples. Even after affirming that the two people want to be with each other, couples often go through premarital counseling to do the work that will get their marriage off on the right foot. Having a robust onboarding program for someone is not an indication that your faith in him or her or your choice is faltering; it’s an indication that making an investment in a strong foundation is worthwhile.

Navigating the transition paradox

Early on in a talented manager’s career, when the moves from role to role are happening quickly and with regularity, a good deal of attention is paid to making the transition smooth, effective, and without tension or derailment. The development leaps required are modest, but the respect for the complexity of transition is high. As these future executives successfully navigate transition after transition, confidence grows and a good deal of optimism surrounds executives as they enter each new role. As you might anticipate, this confidence diminishes the attention paid to transition. Just as the roles become exponentially more complex and the stakes for effective transition are higher than they’ve ever been, the executive’s confidence in his or her ability to navigate causes him or her to underestimate the gravity of the transition task ahead.

This is one of the biggest onboarding pitfalls we see. It is especially apparent before the transition has occurred. There is a lack of awareness that the role is an exponential shift, not a stepwise move. One consequence of overconfidence is that the executive underestimates the potential for problems. Without intervention, the executive goes into the new role making assumptions that this transition is going to be like every other transition. This assumption comes to a head most emphatically when corporate culture plays a big role.

When an executive is going into a new culture and underestimates the novelty of the situation, the potential for "organ rejection" goes up. The executive might go in with zero knowledge of how this culture welcomes people from the outside or whether the organization has ever successfully responded to a change agent. The executive may not know what the dynamics are on the team he or she is inheriting and whether people on the team advocated for someone other than you to get the job. Overconfidence results in a complete underestimation of the complex, tenuous nature of the situation.

A dose of humility can serve as an antidote, instilling in the executive's mind that this is a novel situation, one that may have complexities that deserve a more thoughtful approach. This can be framed to the executive as tension, complexity, and nuance that exist in the organization. For example, when an executive becomes aware that expectations for the role are different for different constituencies, it becomes an opportunity to ask questions and tread thoughtfully. Creating some tension and introducing some doubt into the mind of the executive triggers pause, inquiring, questioning, and reflection – all qualities of a curious, humble, willing learner. Qualities that will likely increase the attention that the new executive pays to the transition, thereby giving the critical onboarding phase the respect it requires.

Optimizing the leadership moment

If you run an airline or a theater company, you are very familiar with the concept of perishable assets. When a flight takes off or the curtain goes up and you have not filled every seat, the opportunity to capture the return on those assets vanishes. Executives who are about to assume a new role hold in their hands a perishable asset too: the undivided attention of people. This may be the most frequently squandered asset of newly transitioned executives.

Few leadership challenges can be met without commanding the attention of the people the leader is trying to mobilize. Reaching employees, customers, shareholders, analysts, and board members to share a vision, to give a direction, or to inspire an action is the executive role that transcends

Seized leadership moment

A newly named division president, knowing that an insular and internally focused culture was jeopardizing the growth of the business, used his “moment” to catalyze his externally focused strategy. For his first two weeks on the job, he spent every day visiting customers with his sales team and his vice presidents. No meet-and-greets at headquarters, no town hall events, no executive staff meetings. Just a very strategically focused message: our days of navel gazing are over. Of course, this is a message he could have talked about in his meet-and-greets, covered in a town hall PowerPoint presentation, or laid out with metrics and accountabilities for his executive team. But instead – with all eyes in the organization on him – he aligned his behavior with his message and left no doubt about where he would be leading the organization.

Squandered leadership moment

Moving from Chrysler to Wal-Mart as the new head of marketing and communications, Julie Roehm decided to take on the task of updating Wal-Mart’s image. Among her first actions at Bentonville’s subdued, gray corporate headquarters, Roehm painted her office chartreuse with chocolate brown trim. In the end, this was symbolic of the clash between Roehm’s style and Wal-Mart’s culture. Just ten months after her start date, she was let go.

This incident does not mean that Roehm was deficient in some way nor does it mean that Wal-Mart has a poor business strategy. It merely reflects a qualified, capable executive not realizing the message she would send or considering how that message would be interpreted. Every action a leader makes is an opportunity for people to find meaning. Since one of her first official acts was to repaint her office, that said something about her leadership, focus, and objectives to everyone around her. They saw her as flashy and insensitive to their culture. Maybe she went in with inspiring change as an objective, but the way she used her leadership moment was interpreted as thoughtless and it undercut the goals she wanted to accomplish.[11]

At the critical stage when a leader is onboarding, everyone is paying attention. Not because the new leader is particularly fascinating, but because people are trying to pick up clues about what their life will be like in the future. The new leader is possibly in a position to make decisions on how people’s lives are going to change, so it’s very personal.

all other roles. Connecting with these stakeholders is a challenge of monumental proportion.

But there is one time when commanding that attention is easier. When an executive assumes a new role, there is a moment when all eyes are on him or her. It is an opportunity for the new leader to set the stage for his or her vision and priorities. It is the time when that most precious and most fleeting of leadership assets – the undivided attention of people – is at its peak.

Leaders underestimate their impact on the people around them, and that is especially true when a new leader comes on the scene. The leader might think they will be given some time to get acclimated before people pay close attention and make judgments. Not true. In fact, in the first weeks and months of his or her tenure, the new leader's every move, every word, and every nuance receives the rapt attention of people looking for clues about what they can expect. A thoughtful and purposeful approach to onboarding and the onboarding action plan can assist leaders in making the most of this "leadership moment."

Conducting a situational analysis

Situational analysis is designed to facilitate open discussion about the context into which the newly hired or promoted executive is entering. The success of the situational analysis is based upon the assumption that when informed of the need, most leaders have the ability to moderate and adjust their preferred style as they enter an organization. The value the situational analysis adds is that it brings to light perceptions, assumptions, misalignment, and areas that require more attention and clarity. The conversation typically involves the new executive, the Korn/Ferry search partner, and consultant. Further conversations with the hiring manager, direct reports, key stakeholders, and HR may take place to round out the information gathered in the situational analysis.

Now that the interview process is over, all parties can dive into a deeper and realistic conversation about the expectations of the role. The goal is to discover information that can be useful to the newly placed executive as he or she comes into a new role.

When Korn/Ferry manages the search we gain a lot of knowledge about corporate dynamics that can be helpful to the new placement. For example, why the job was opened, what created that opportunity, and whether there is any drama associated with the position. We know the organization's expectations about what it wants this person in the new role to accomplish. We know whether there is agreement, and how much disagreement there is about those expectations. We know how much agreement there was about the placement among detractors and supporters. As a placement, you would want to know if you weren't the unanimous choice. Also, we know whether there were people inside the company who were vying for the job, which can be potentially problematic. It's rare to find an organization where there is complete agreement about what the person should focus on, and how quickly to drive change. All of this nuanced understanding of the situation can be useful context to the person coming in.

The situational analysis involves an exploration of a few key topics:

- What are the organization's expectations of this role? How is the role defined?
- Do those expectations differ for different key stakeholders?
- Who are the most important stakeholders and teams to be cognizant of?
- What will be helpful to know about the new team? What impressions have been made from early assessments of the team?
- What is the organization's culture?
- What is the organization's history of orchestrating change? Has it successfully launched a change initiative? How does it respond to people who bring change?
- What are the insider/outsider dynamics in the organization?
- How do the new executive's leadership characteristics and style fit with what is mission critical for the role?
- Based on the contextual issues, what will be the individual drivers of success and what are the individual red flags that need to be managed or mitigated?

Based on the answers discovered through the in-depth dialogue, an onboarding plan is drafted and agreed upon. In many cases, as in the example here, the situational analysis conversation can uncover invaluable insights that alter the new executive's impressions and approach for the better. We often hear, "If I hadn't learned what I did in the course of that conversation, I would have needlessly struggled and possibly failed in my new job. But given the space to consider the context I was entering, I was able to adjust my goals and style to meet the need."

Course correction before day 1

One company recently completed a search for a new Chief Human Resources Officer (CHRO). In the course of her interview with the CEO, one candidate correctly heard that the CEO wants a strong HR partner. The CHRO predecessor had not partnered as much as this CEO would have liked. The candidate took this knowledge into her other interviews and emphasized her willingness and commitment to partner with the CEO.

The situational analysis was conducted with the CEO, COO, and CHRO in the room. Korn/Ferry was facilitating and asking questions such as, “Who succeeds here and who doesn’t succeed here? What works for people coming in to the organization?” At one point during the conversation, the CEO bluntly told the incoming CHRO, “One thing you should know – the rest of the senior team got the impression that you are here to serve me and not the team.”

What began as a well-intentioned emphasis on partnership with the CEO was blown out of proportion when the CHRO’s future peers felt that she had overemphasized the CHRO-CEO partnership in her conversations with them.

Without that meeting, she would never have known. Before she started the job, she could correct that by slightly changing her narrative when she talked with her new colleagues. It was a matter of nuance because the CEO did want a partner, unlike the previous CHRO. So, it was partially true, but by emphasizing it too much she had created the wrong idea with her peers.

Now when she had her initial one-on-ones with other team members, she could refine her message. She assured them that she could understand that different people had different expectations for the role. The CEO had his expectations and focused on his needs. But the CEO’s needs didn’t reflect the team’s needs necessarily. Due to the insight gained in the situational analysis meeting, this incoming CHRO was able to strategically position her role and ask for input from others regarding what they needed from the CHRO.

For a placement, it's so easy to not know what impressions have been given in the course of the interview process. New executives don't start from zero on Day One. People already have a view of the new leader. Only through dialogue that helps to uncover the context can a placement discover whether the reputation he or she has is one that needs to be undone, altered, or augmented.

In this case, the group had an exceptionally good three-hour situational analysis. All the participants said "Wow, to have this wealth of information about the culture, who succeeds, and who doesn't is invaluable." They not only felt that it was worth their time, but they were grateful for the outcome.

Introducing change, with all due respect

New executives coming in as change agents, or even those who just want to institute subtle modifications, need to find aspects of the organization that they genuinely respect. And any change they initiate needs to be founded on that respect. If people sense that an executive is coming in to orchestrate change before that executive has a clear understanding and appreciation for what the organization has accomplished to date, the chance of "organ rejection" goes sky high.

The important thing is that the respect be genuinely felt. If executives think they can go through the motions, curry the favor of the powers that be, and move along to champion change, they will not be successful.

Communicating that respect can come through words and actions. Whether it's taking time to listen to stories, attend a retirement party, peruse the company archives, or meet with the founders – or meet with the founders, executives can immerse themselves in the legacy of the organization. Stories in particular have a way of conveying the culture and values of an organization. Knowing how to interpret those stories and what they say about what's important to the organization, and what the organization is skilled at, can be clues as to what is a source of pride. Discovering unique qualities about an organization through its stories and history can help inform a new executive's actions and decisions.

Some organizations have extremely strong and traditional cultures. There are a lot of organizations in which offense can be taken if there is any implication that they are not doing it the right way. Even if new executives are sensitive to it, they are not sensitive enough, particularly if the executives are expressing judgment or the need for change within the first few weeks of joining the organization. The level of pride at some companies rivals the kind of national pride that can be observed in many countries. Most people would not dream of swooping into another country to change up key traditions, mannerisms, or customs without a level of understanding and appreciation for that culture. Same goes for corporate cultures.

Subtle disrespect

A new executive was brought into a very large but family-owned business before it was publicly held. This person liked to say, "at my old company we did it this way." This was a very polite culture, so people around the table were nodding and smiling but inside they were thinking, "if you say that one more time you are gone."

Breaking the predecessor's mold

When Princess Diana said to her interviewer, "There were three of us in this marriage, so it was a bit crowded," no one had to guess what she was experiencing. A similar sensation is reported to be part of many executive transitions – the presence of the predecessor lingers, crowding the new executive. The experience is often so subtle that few executives are able to articulate what is happening. But it is not their imagination. The role they've just assumed has been imprinted by those who sat in their chair before them.

Research has shown that the first person to hold a particular job in a new organization, or a long-term predecessor in an established organization, puts his or her imprimatur on the role so indelibly that it can determine the success or failure of those who follow. One study revealed that leaders tend to be more successful in new positions if they exhibit qualities seen in the executives who held the roles previously – even if their backgrounds were not typical for the role.[12] In some organizations, the imprint on the role created by the first incumbent impacted the success of not just one but several generations of successors.

It is not difficult to see how this happens. Incumbents create the role around themselves. Not only is the job defined by them, but the jobs that are structured around them are built to fit. When the incumbent moves out of the role and a replacement is named who brings a different set of qualities to the job, the fit with the role is often poor. Filling the role will be awkward and will likely lead to early departure. Creating the role to fit the replacement is the only successful path.

A strategic onboarding effort can help new executives handle the lingering imprint. It can help them learn as much as possible about predecessors. What were their priorities? How did the organization accommodate their strengths and weaknesses? What clues can you get from reviewing old organizational charts, titles, roles, and reporting relationships?

An onboarding plan can help the new executive thoughtfully strategize how to meet the organization where it is in order to move it forward. What leadership qualities will need to be called upon to advance new strategic priorities? Who is a good source of feedback for the new executive so that he or she can maintain some perspective and awareness of how things are working?

One key objective in the onboarding plan can include finding new intersection points between the new executive's role and the team's role. Each team member's responsibilities and skill set complemented the predecessor in a particular way. How can the new executive re-engage each team member to maximize his or her contribution?

Like it or not, a new executive's success or failure in a role can be partially determined by the imprint left by the predecessor. The most indelible marks are left by first-timers who hold a job in a new organization or long-term predecessors. These leaders custom fit the role to their unique strengths, weaknesses, and preferences. Their imprint on the job will not only impact the new executive but also several generations of successors.

Positions are shaped by the people who hold them. For new executives to leave their own legacy, they will need to break free from the mold and make the role their own.

Agile leader, agile organization

The level of learning agility varies from executive to executive. Highly learning agile executives perform exceptionally well when they encounter challenging, ambiguous, and novel situations. These leaders are adaptable and flex with the culture or strategy of the organizations. They make fresh connections. They like to experiment with new approaches. They were chosen for their ability to draw upon their broad experience and lead in uncharted territory. On the other hand, some executives come with a specialized skill set and an approach that has worked for them elsewhere that they plan to apply again. They were chosen for their deep expertise and their proven track record delivering results in comparable situations.

Similarly, companies can possess a lower or higher amount of agility in terms of the capacity of the organization to embrace change and ambiguity. One can imagine that the transition into a new role will look different for a highly agile leader joining a less agile organization. Or for a less agile leader joining a highly agile organization. Given that, how should their transition support be different? Each resulting scenario begs for its own transition focus and a different approach to executive onboarding. Four scenarios emerge as we examine these questions.

	Low agility organization	High agility organization
High agility executive	Transition work focuses on building a new executive's understanding of the organization and self-awareness in the context of the organization culture and stakeholders.	Transition work focuses on possibilities, direction, vision with new executive and team, carefully selecting priorities.
Low agility executive	Transition work focuses on knowledge transfer to equip a new executive with as much organizational history as possible.	Transition work focuses on preparing the organization for culture change in light of a new executive's leadership style.

1. Highly agile executive joins a low agility organization

We work with many highly agile executives who are curious, able to deal with complexities and ambiguities, self-aware and resilient, and able to inspire others to get results in the most difficult circumstances. They often are brought into established organizations that have not demonstrated the ability to flex and change quickly.

When the executives are more adaptable than the organizations, the executives benefit most from a full briefing on every aspect of the organizations and cultures and how their preferred leadership style is likely to play out. Wherever their style will work against them in the culture, those aspects of their leadership are highlighted for modification – anticipating that these points of tension will be the probable source of derailment. When executives have agility, it is more likely that they can, with support, adapt the most important aspects of their leadership style to the needs of the organization. For example, a highly action-oriented executive will need to carefully calibrate the amount and pace of early change given how much the organization can absorb.

2. Low agility executive joins a highly agile organization

Executives who have been highly successful over the course of their career are often quite established in their leadership style. They are confident about what works, they have seen it all, and they come into a new role with a tremendous amount of optimism about their ability to be successful. They are prepared to bring what they are good at to the new role. When that role is in a fast-changing, new, or reconfigured setting, you have an agile organization welcoming a relatively established executive.

When the organization is more adaptable than the executive, the approach shifts toward preparing the organization for the new executive's leadership style. Although it is still appropriate to brief the executive, it is done with full recognition that the leader's style will not likely change in significant ways. Rather, with a highly agile organization, the adaptability lever is with the people, culture, processes, and practices of the organization. For example, the organization will need to be primed for the kind of change that the executive is known to deliver.

3. Low agility executive joins a low agility organization

When an executive with low agility joins a stable organization, the adaptability options are restricted. While there is always benefit in making each side of this equation aware of what it is they are likely to experience with the other, transition support is done without expectation that it will result in malleability. Rather, the focus is on knowledge transfer. Sharing history, experience, practices, preferences, and stories that reveal what's important to the executive and organization will provide the best opportunity for a meeting of the minds in this arranged marriage. The relationship may not begin with a great deal of passion, but it can be a fruitful relationship developed over time. For example, the new executive needs to demonstrate genuine respect for the organization's history in setting direction so that the amount and pace of change are not likely to create tension.

4. Highly agile executive joins a highly agile organization

Placing a highly agile executive in a highly agile organization opens up possibilities. With neither the executive's style nor the organization's culture restricting possibilities, the challenge becomes identifying priorities that will focus the attention of the organization and its energy for moving forward. When both the organization and new executive enter the relationship eager for fast-paced change, the challenge will be establishing a sustainable agenda.

Depending on which scenario most closely describes a given situation, onboarding priorities need to be set in a way that will make it easiest to accelerate the executive's contribution.

Maintaining a global perspective

Given everything discussed so far, executive transition can vary greatly in different regions of the world, different cultures, and different markets. Consider how business is conducted in frontier markets versus emerging markets versus developed markets. Managing executive transition in frontier markets may require even more tolerance for ambiguity, even more willingness to operate in a flexible manner.

Different cultures or regions may have practices that work well and should be incorporated into an organization's approach to onboarding and managing executive transition. For example, in India many companies bring new hires on in cohorts. These cohorts often take on a class identity (e.g., class of 2012). The cohesion fostered by this collective identity can serve to build loyalty, create a strong corporate culture, and enhance the employee value proposition. Regional onboarding practices also include the trend in Asia to assign board members as mentors for executives very early on in the onboarding process. Learning from these practices and applying them to executive transition efforts around the world will benefit leaders taking on new and challenging assignments.

Leave assumptions behind and ask questions of local global offices. Often, when presuppositions about what works are set aside, there can be surprising cross-pollination of ideas. Regional, cultural, and market differences can provide fodder to enhance onboarding and executive transition practices at home and abroad.

Conclusion

When leaders take on new roles, it's an exciting time of transition for both the executives and the new organizations. It is also a time when there is a unique opportunity to establish positive impressions, demonstrate a new focus or agenda, introduce change, and break with old ways of doing things. Korn/Ferry's approach to executive transition focuses on maximizing this unique opportunity by accelerating an executive's contribution in the new role and by minimizing any possibilities of misunderstandings or obstacles that could potentially lead to derailment.

Korn/Ferry is in the business of identifying talented leaders and matching them to roles and organizations. But the value Korn/Ferry brings does not end once a candidate is placed. The best practices here highlight the wisdom and insight honed by Korn/Ferry thought leaders over many thousands of experiences with executive placement and transition. We know that no two executive transition are alike. Given the complexities of each role, the uniqueness of each circumstance, and the stakes involved, each newly placed executive warrants a thoughtful, consultative approach to ensure a successful transition.

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