



Successful Leadership Transitions in a Fast-changing World

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“Typically, organizations work extremely hard to identify and hire new talent...but then rely on hope when it comes to making their new investment successful.”¹

- Scott Saslow, Institute of Executive Development

The growing need for better leadership transitions

The attraction and retention of top senior talent have never been more important than in our current culture. Speaking at a Harvard Business Review Event, Michael D Watkins, said “Today we are in a world of transition – there is so much change going on... well-structured and delivered transition support halves the time required for leaders to become fully effective in their new roles.”² This transient zeitgeist has only been reinforced

by the Covid-19 global pandemic which gave many the opportunity to pause and re-assess the trajectory of their lives and careers, leading to ‘The Great Resignation’ peaking in the summer of 2021. With many people quitting their job - statistics from 2022 show that of a global sample surveyed, 40% of workers were considering leaving their jobs³ – organizations are having to adopt a multi-faceted approach to attract and retain talent.

What is effective leadership transition?

“Enabling new leaders to become effective and successfully integrated in their new role (and organization in the case of external hires) through insight, guidance and support.”

Brook and Lucia-Grace, 2022

¹ Burroughs, M. (2011). Before onboarding: How to integrate new leaders for quick and sustained results. Create Space Inc.

² Sharp, R. (2019, Oct). Michael Watkins: Transitioning is a core leadership skill. HR Magazine. Downloaded from <https://www.hrmagazine.co.uk/content/news/michael-watkins-transitioning-is-a-core-leadership-skill>

³ De Smet, A, Dowling, B., Hancock, B. & Schaninger, B. (2022, July). The great attrition is making hiring harder. Are you searching the right talent pools. McKinsey & Company. Downloaded from <https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/the-great-attrition-is-making-hiring-harder-are-you-searching-the-right-talent-pools>



More executive transitions than ever are taking place as people search to find both a leadership role and an organization to work for which are in greater alignment with their personal values and goals. The global workforce - particularly younger people - is flexible, and often willing to change industries or move anywhere in the world to pursue their career. As many of the world's largest economies face an ageing population and shortage of STEM (Science, Technology, Engineering and Mathematics), leadership, and other scarce skills, the war for top talent is heating up, and talent attraction and retention is of paramount importance. Despite this, 50-70% of all executives are pushed out, fail, or quit during their first eighteen months in a role.^{4,5,6} Nearly all companies are competent in the administrative aspects of onboarding a new leader, far fewer are invested in ensuring the successful integration of the new hire and supporting their progress to becoming a fully functioning member of the team. An extensive 10-year study

with executives revealed that 76% of new executives rated the formal development processes of their organization as unhelpful, or at best minimally helpful, in preparing them for their executive role while 55% indicated that they had no or minimal ongoing coaching and feedback to help them succeed in their executive role.⁷

According to McKinsey, executive transition can be defined as “the period (which can last up to 18 months) after an executive has assumed his or her new C-level responsibilities”.⁸ It is a process that starts before the leader joins the organization and goes well beyond onboarding, rather than being a one-time event. Successful executive transition enables new leaders, both internal and external hires, to quickly become effective, productive, and securely integrated into the organization. However, for successful executive transition and integration to happen, there needs to be structure, support, and guidance in place. However, many leaders

⁴ Keller, S. and Meaney, M. (2018, May). *Successful transitioning to new leadership roles*. McKinsey & Company. Article downloaded from <https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/successfully-transitioning-to-new-leadership-roles>

⁵ Fisher, A. (2021, Feb). *New job? Get a head start now*. Fortune. Blog downloaded from <https://fortune.com/2012/02/17/new-job-get-a-head-start-now/>

⁶ Smith, J. *4 common reasons half of all new executives fail*. Business Insider. Downloaded from <https://www.businessinsider.com/reasons-executives-fail-2015-3?r=US&IR=T>

⁷ Smith, J. *4 common reasons half of all new executives fail*. Business Insider. Downloaded from <https://www.businessinsider.com/reasons-executives-fail-2015-3?r=US&IR=T>

⁸ McKinsey & Company Survey (2015, April). *Ascending to the C-Suite*. Downloaded from <https://www.mckinsey.com/featured-insights/leadership/ascending-to-the-c-suite>

experience a hands-off, DIY approach to their transition. They are dropped into a new role and then left to handle it, the assumption being that because they have the skills and competencies to be hired, they should know enough to get themselves up to speed. However, research shows that transitioning leaders struggle with a whole range of transition challenges, including understanding how the organization works, the political dynamics, role ambiguity, ineffective decision processes, poor feedback and support from their boss and an incomplete comprehension of the business model and strategy.

Byford, Watkins and Triantogiannis (2017) state that “Well-integrated executives can build momentum early on rather than struggle up learning curves...the average amount of time to reach full performance (making critical decisions with the right information in hand and having the right people in place to help execute) can be reduced by a third, from six months to four.”⁹ When support, quality feedback and clear expectations are lacking, the transitioning leader can struggle to integrate successfully and studies show that without structured development in place transitioning leaders are much more likely to quit.

With many executive and leadership transitions resulting in failure in the first 18 months, it is important to understand the significant impact and costs for the individual and organization. The direct financial costs can include search fees, relocation costs, signing bonuses and stock or grant options. The indirect costs can be even greater. These include lost time associated with finding and integrating a replacement, the negative impact on business performance which can last for years, reputational damage, loss of new market opportunities and detrimental effects on employee morale. Estimates show that overall, the cost of a failed leadership transition can be 2.5 to 20 times the leader’s yearly compensation.¹⁰ However, as pointed out by Moore, the real costs are that “without high performing leaders, you limit people’s potential to achieve results and lose vast sums of money.”¹¹

The price paid by departing leaders is also very high, including damaged career trajectories, lost earnings, a decline in self-confidence and significant stress.

⁹ Byford, M. Watkins, M. and Triantogiannis, L. (2017, May-June). Onboarding isn’t enough. HBR Magazine.

¹⁰ Nazemian, N. (2021). *Mastering executive transitions*. New Degree Press

¹¹ Moore, R. (2023). *What is the real cost of failed leader recruitment?* Downloaded from <https://www.mercuriurval.com/global/institute/insights/what-is-the-real-cost-of-failed-leader-recruitment/>.



Being a new leader is more challenging than ever

Leaders in most organizations are facing a tsunami of change. The list of priorities for new leaders and executives today is extensive to say the least. It includes important and typically urgent tasks like building their team, choosing the right strategy, securing early wins, building relationships and alliances, and projecting a credible and inspiring presence. However, it also involves a host of formidable adaptive business challenges. These include technological change, how to organize work and lead the workforce post Covid, environmental and corporate social responsibility concerns, economic pressure and rising inflation and increasing global competition.

We refer to **6 defining challenges** facing leaders today:



The purpose challenge

Crafting and communicating an inspirational purpose for their business that creates meaning and motivates co-ordinated action to create exceptional value for customers.



The talent challenge

Finding, motivating, deploying, and developing the best talent in their team, but also at every level in their business.



The productivity challenge

Raising productivity by discovering new and smarter ways to work and generating improved results.



The innovation challenge

Accelerating creativity and innovation to uncover new products, processes, and lines of business to deliver sustainable growth by exploiting market opportunities, collective intelligence, and emerging technologies.



The culture challenge

Ensuring a positive, engaging, and supportive culture is cultivated and maintained where people feel they are included, empowered, and developed so they can thrive at work.



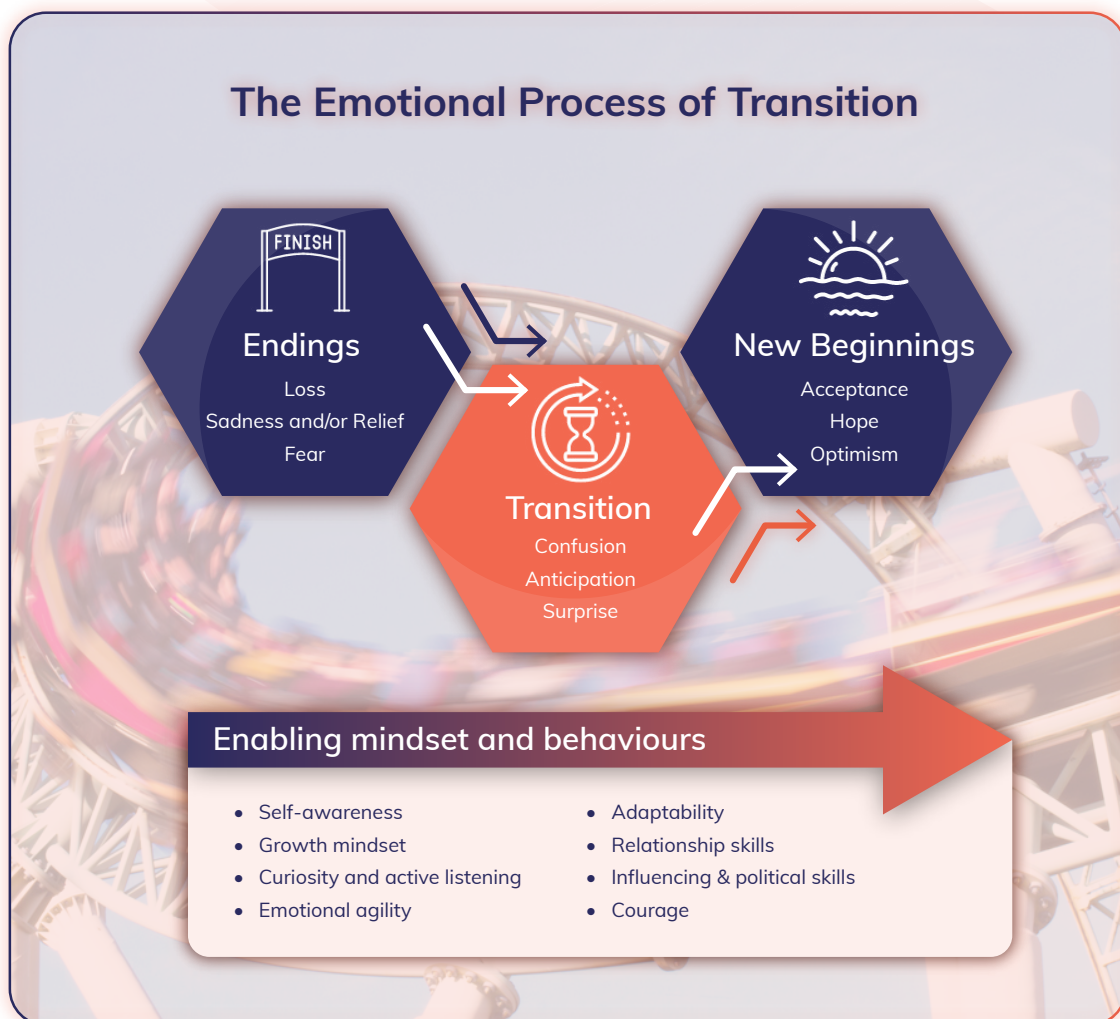
The wellbeing challenge

In an increasingly fast-paced and pressurized world, promoting wellbeing, compassion, and resilience to mitigate distress, burnout, and stress-related health problems.

The emotional roller-coaster of transitions

The transition process is often wrongly described in a rather procedural, matter-of-fact way. Typically, top executives and HR leaders recognize that taking on a new leadership role involves a shift in mindset, behaviours, and skills. However, there is little consideration given to the psychological and emotional shifts that transitions involve. Yet these can be considerable and often determine the success or otherwise of a leadership transition, regardless of whether the

new hire is an internal or external candidate. In his Transitions Model, William Bridges focused on the psychological and human side of change, which he referred to a “transition”.¹² Bridges maintained that while change may happen quickly, personal transition is a lot slower and involves a complex process of adaptation. Applying this model to leadership transitions, we can see that leaders go through three main stages when they transition into a new role:



¹² Bridges, W. (1995). *Managing transitions: Making the most of change*. Nicholas Brealey.



Endings

Endings involve psychologically disconnecting from one role (and organization in the case of external hires) before stepping into another. Endings can be filled with a host of mixed emotions such as loss, grief, sadness, fear, and apprehension about the future. To make matters more challenging, very different emotions can occur together. For example, a departing leader who has been with an organization for a long time and has built their sense of identity around their work and network of colleagues in that organization could simultaneously experience sadness, and loss, but also joy and happiness about the prospects that lie ahead.



Transition

Transitions typically involve a roller-coaster ride of changing emotions for leaders. Many of the experiences and events they encounter during their onboarding and transition into the new organization/business area are likely to be ambiguous, novel, complex, unexpected, and diverse. All these experiences need to be processed by the leader through a complex interplay of rational thought, emotions, and physiological reactions, resulting in a diverse range of decisions, actions, learning and emotional states. Many of these emotions will be muddled and intensely felt. Common emotions experienced during this stage include confusion, anticipation, and surprise.



New beginnings

As the leader settles in and becomes more familiar with new ways of working and how to perform effectively in their new role, they are likely to experience emotions such as acceptance, hope, and optimism. Those who undergo successful transitions may also start to experience a growing psychological engagement with their role, team, and new organization. This engagement is important for higher levels of discretionary effort, self-confidence, and performance. However, a significant proportion of new leaders never reach this point. Poorly planned and executed onboarding and transition processes result in a range of emotions for the leader including pessimism, despair, powerlessness, and disappointment, which signals for them to quit and move on.

Common transition traps

There are a variety of reasons why leaders and executives fail to transition effectively. Some stem from failures by the organization to provide effective support, guidance, coaching and onboarding to transitioning leaders. However, failures can also be caused by the mindset, behaviours, and missteps of the incoming leaders. According to Genesis Advisers, culture and politics are the biggest reasons for failure during transitions¹³, however, there are many other traps for leaders taking on new roles.

The most common traps include:



Failure to build strong relationships

When leaders transition into a new business area or organization, they often underinvest in getting to know their stakeholders in order to build a strong foundation of trust, respect, and openness. There are numerous reasons for this, including getting pulled into resolving urgent challenges and crises by their boss and a desire to achieve early wins with maximum

impact. However, this trap is typically the one that undermines a leader's effectiveness the most. By under-investing in building relationships, they are less effective in gaining the early support, trust and commitment of colleagues, direct reports, board members and other constituencies who are essential to their success.

¹³ Genesis Advisers (2021). Accelerating transitions in hybrid environments. Downloaded from <https://news.genesisadvisers.com/accelerating-transitions-in-hybrid-environments>





Arriving with fixed assumptions and beliefs

New leaders are usually keen to prove their worth quickly by applying their experience to achieve quick wins and create a favourable impression. However, what's worked in one context often doesn't translate well to another. Although leaders may be able to get away with coming up with answers based on their past experiences in the first few weeks, this approach is likely to backfire if it becomes

a regular pattern. People soon tire of being told by the leader how things should be done based on what they've done in the past. They will start to question the leader's judgement and commitment to the team and business, thinking to themselves "if it was so great at your previous company, why don't you just go back there!".



Overpromising

New leaders are often keen to win the backing of their employees, manager, peers, and other key stakeholders. This trap is aptly illustrated by what we are seeing with many politicians today when they make lofty promises to their constituents that they can't ever hope to deliver on. Such behaviour causes leaders

to underdeliver on promises because these commitments are based on unrealistic optimism, poor assumptions, and an inadequate understanding of the realities. This self-sabotaging behaviour can quickly leave people feeling disappointed and frustrated, undermining trust, respect, and motivation.



Forcing through change too quickly

Occasionally, leaders need to act quickly and be highly directive in the first few months in their new role. This typically occurs in turnaround situations where fast change is necessary, however, most leaders have time on their side during the initial months to learn about the business and explore different

options before making big changes. Despite this, many leaders still tend to jump in too quickly without establishing clear priorities. They try to impose change without thinking through all the implications or gaining the commitment of key stakeholders.



Listening only to the loudest voices

Any new leader faces a multitude of divergent expectations, views, and inputs from diverse stakeholders. The leader's natural tendency will often be to listen to the loudest voices, especially if these people are highly influential

board members or investors. It is important to resist this temptation and remain neutral until they are able to gain a better understanding of the different voices, political structure, and dynamics of the organization.



Acting without understanding the context and culture

Acting without a good grasp of the culture is one of the most common causes of failed transitions (Genesis, 2021). Many leaders act in non-cultural ways and make big

decisions to change things too early, before they understand the history, politics, norms, assumptions, and implicit ways of doing things in the business.



Failure to adapt strengths, style, and approach

Leaders have different strengths, styles, and ways of working. Most develop well-established routines and habits in the way they use these, particularly if they have been in a role and/or organization for many years. However, they need to avoid the trap of assuming what has made them successful in the past will guarantee success in future, as this is rarely the case. For example, if previously they have been leading a

relatively new team and are now taking over a well-established, high-performing team, they should adapt their style to ensure it is more participative and empowering. If the new leader tends to be naturally decisive, opinionated and controlling, they may have to intentionally dial back on these strengths when working with a more autonomous and experienced team.



Becoming stressed and overwhelmed

New leaders often rush into their new job with energy and enthusiasm. Because of their desire to make a quick impact, they put in long hours and invest a great deal of physical, mental, and emotional energy in their new role. The energy required to

transition combined with the demands of the new job can easily become all-consuming. If the leader neglects the warning signs, they can experience high levels of stress, become overwhelmed, and even burn out.

By helping new leaders become more aware of these common traps and providing them with a well-structured, supportive, and professional onboarding and transition experience, you can mitigate the risks of leadership failure during the first year, when the stressors and stakes are greatest.



Why invest in professional leadership transitions?

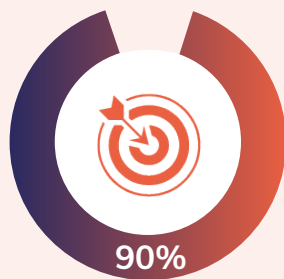
Organizations typically underinvest hugely in onboarding and successfully transitioning their new hires. A study by Russell Reynolds found that roughly 90 percent of the cost of a new executive hire is spent upfront during the hiring process, with only 10 percent or less spent transitioning the new hire into their role.¹⁴

Investing in well-structured and professional transitions of leaders, regardless of whether they are external hires or internal successors, has numerous benefits for the leader, their direct reports, colleagues, and the organization.

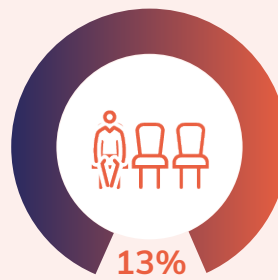
Studies show that with effective transition support, the average time for new leaders to reach full performance can be reduced by a third, from six months to four.

Genesis Advisers, 2021

Successful transitions result in...



higher likelihood of teams led by transitioning leaders meeting their 3-year performance goals



lower than average attrition risk

Source: CEB (2012). Successful leadership transitions boost corporate revenues by as much as five percent. Downloaded from <https://www.prnews-wire.com/news-releases/successful-leadership-transitions-boost-corporate-revenues-by-as-much-as-five-percent-180826391.html>

¹⁴ Dineen, S. (2021). De-risking executive transitions to accelerate value creation. Downloaded from <https://huntscanlon.com/webinars/de-risking-executive-transitions-to-accelerate-value-creation/>



Some of the main advantages of investing in professional leadership transitions are:

Effectiveness of direct reports

A large-scale Corporate Executive Board (CEB) study involving over 30,000 leaders has shown that leaders struggling in transition have direct reports who perform 15 percent worse than those who work for a high-performing one and are 20 percent more likely to be disengaged or leave the organization.¹⁵ This occurs because organizations employing effective transition strategies focus not only on transitioning the incoming leader, but also on their team and close colleagues.

Better financial results

The CEB study also showed that successful leadership transitions can boost revenues by 3 to 5 percent and profits by 2 to 5 percent. These approaches accelerate the learning and ramp-up time of new leaders and their teams. This avoids unwanted turnover and organizational paralysis, boosting performance and the financial health of the company.

Success, wellbeing, and future progress of the leader

A well-engineered and executed transition has a variety of benefits for the leader, including:

- i. reduced likelihood of derailment by up to 50 percent,
- ii. accelerated transition that is up to 50% faster compared with leaders who don't receive structured transition support, and
- iii. positive outcomes for the leader's work performance, overall wellbeing, and future career prospects.¹⁶

¹⁵ CEB (2012). *High-impact leadership transitions: A transformative approach*. Downloaded from <https://docplayer.net/4194979-High-impact-leadership-transitions-a-transformative-approach.html>

¹⁶ Nazemian, N. (2022, April). *The business case for successful CEO transitions*. CEO Today. Downloaded from <https://www.ceotodaymagazine.com/2022/04/the-business-case-for-successful-ceo-transitions/>

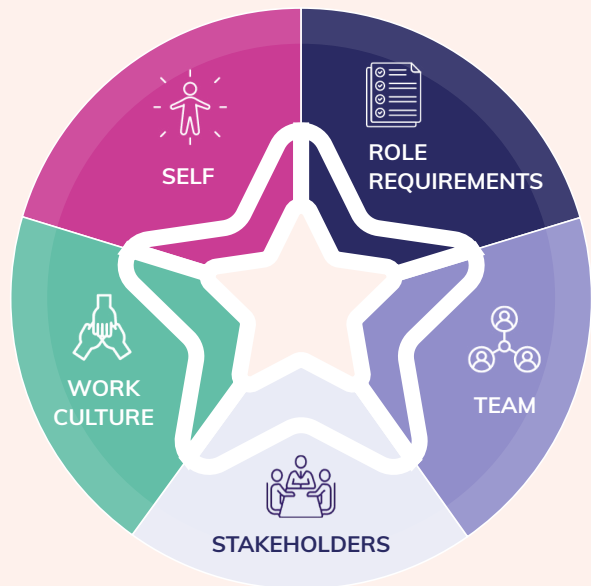
Principles and practices to improve leadership transitions

“Leading organizations provide transitioning leaders with support well beyond – and in some cases before – the first 100 days.”¹⁷

The effectiveness of leadership transitions can be significantly improved by implementing a more structured, supportive, and engaging onboarding and integration process.

McKinsey highlighted five key dimensions that transitioning leaders need to discover and navigate to be successful: Self, Role and Business/Function, Team, Other Stakeholders (Internal and External), and Work Culture¹⁸ (see diagram, on the right). Effective support should be provided by the organization to first help the transitioning leader take stock of these dimensions by asking the right questions and then, decide on the best course of action to achieve high levels of effectiveness and results.

5 Key Dimensions of Leadership Transition



Adapted from McKinsey & Company (2018, May).
Successfully transitioning to new leadership roles (p.4).

¹⁷ CEB (2012). *High-impact leadership transitions: A transformative approach*. Downloaded from <https://docplayer.net/4194979-High-impact-leadership-transitions-a-transformative-approach.html>

¹⁸ Keller, S. and Meaney, M. (2018, May). *Successful transitioning to new leadership roles*. McKinsey & Company. Article downloaded from <https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/successfully-transitioning-to-new-leadership-roles>

5 Key Dimensions of Leadership Transition



Self

DISCOVER: Have you clarified your career aspirations, strengths, improvement areas and work-life boundaries?

ACT: Focus on goals that align with your strengths, expertise and career aspirations. Delegate other tasks to those with the strengths and potential to do them well. Invite feedback, coaching and mentoring to strengthen self-awareness and leadership.



Role Requirements

DISCOVER: Do you understand the goals, processes, policies and capabilities? Are you clear on the purpose, strategy, challenges, and opportunities for the organization and your business area/team?

ACT: Take time to invite input from all team members and key stakeholders so you can incorporate their perspectives into decisions about your priorities, plans, requirements and quick wins.



Team

DISCOVER: Do you have the right people 'on the bus' – those with the mindset and diverse mix of strengths, capabilities and experience to deliver your goals?

ACT: Decide whether you need to make any changes to the team's composition and ways of working. In collaboration with the team, plan how to build and sustain a high-performing, engaged team.



Stakeholders

DISCOVER: Have you spent time with key stakeholders to get to know them and exchange mutual expectations, work preferences and priorities?

ACT: Build strong relationships and a regular cadence of meetings to promote trust, respect, candour, and collaborative problem-solving.



Work Culture

DISCOVER: Do you understand the current culture, including the assumptions, beliefs and values that influence behaviors, how people interact and ways of working?

ACT: Get to know the organizational politics, including who has power over key resources and decisions. Respect and leverage cultural strengths, including productive attitudes and behaviours. Over time, use your influence to improve and evolve the culture to support strategy execution and future growth.





Some of the essential guiding principles and practices behind successful transitions are:

Start the onboarding process before the leader joins

Onboarding and integration programs vary in scope and effectiveness, but many start the process too late, after the leader has already joined the organization.

To accelerate the integration of the leader into the organization, it is advisable to start the process before the leader's start date. This phase of the process is called "pre-boarding". Steps companies can take to support new and transitioning leaders include:

- Providing the leader with an opportunity to reflect on and capture insights and learning from their current or past role. This helps them gain better self-awareness of how they have performed, what they've learned, and the principles, behaviours, and routines they would like to carry into their new role, as well as those they'd like to change or discard.
- Assigning a "buddy" to the new leader. A buddy is typically an experienced leader in the new business who can meet with the new leader in advance of them starting their new role to provide insights about the

company structure, culture, stakeholders, strategy, etc. and to answer initial questions the leader may have.

- Ensuring HR arranges a pre-boarding session with the leader to clarify the onboarding process, answer any outstanding points about the contract and terms of employment, and provide the leader with an overview of the company's culture, structure, and organizational politics.
- Ensuring the hiring manager meets with the new leader to clarify questions about the role and initial expectations and provide initial insights into the company's strategy, financial results, structure, products, talent, culture, and competitive environment.
- Providing the leader with access to a professional coach to support their transition (this is discussed in more detail, below).
- Giving the leader an opportunity to meet and get to know their new team members in an informal setting such as a lunch or virtual coffee meetup before they start.

Clarify expectations

Leaders starting a new role, especially those who are external hires, need a clear understanding of what is expected of them by their manager, employees, peers, and other constituents. To expedite this process, HR should provide new leaders with an up-to-date organizational chart and stakeholder map, reflecting other key stakeholders who are vital to the leader's effectiveness. They should also ensure new leaders have an opportunity to meet their superiors, peers, and other key stakeholders as quickly as possible. Ideally, responsibility should

be delegated to an executive assistant or senior administrator to arrange these meetings as a matter of priority.

It is also important for HR to include a 1-1 session with the leader in the first week to talk through key HR policies, the employee handbook and any implicit expectations, norms and beliefs related to the company's culture. This will help the leader understand what is expected of them, including all the unwritten rules and standards that don't appear in the handbook and policies.

Provide a structured journey to support effective integration

Studies show that the ramp-up time for external hires is typically six to nine months and the “breakeven point” – the point where the leader has created more value for the organization than they have consumed – is 6.2 months.¹⁹ This time can be accelerated with well-designed onboarding and integration programs. An effective integration program can also reduce costly mistakes and U-turns, improve morale, reduce unwanted attrition, and promote strong working relationships with the leader’s new team and stakeholders. Specific areas that the program should cover are detailed in the diagram below. Key aspects include:

- Announcements regarding the new leader’s arrival to the team, organization, and other relevant stakeholders.
- Meetings with key stakeholders so the new leader can get to know key people they will be interacting with and build a good understanding of the company.
- Policies and procedures relating to the role and team.
- A 90-day plan covering what the leader needs to learn, communicate, and do.
- A feedback and coaching session (ideally with a professional external coach or leadership consultant) based on the hiring and assessment process to help the leader build additional insights about their strengths,

style, and values and how these fit their new context. This session should also consider ways to tackle any performance risks and opportunities for improvement.

- Priority challenges they may face in the first year and who they should engage with to help them deal effectively with these.
- Promising opportunities (processes, people, products, markets, etc.) that are currently being explored and require attention in the initial 6 to 12 months.

Outlined below is a diagram showing the key priorities we help leaders focus on during the first 6 months of their transition journey. By applying this methodology, we enable transitioning leaders to build greater awareness (about themselves and their new context), and align with the strategy, culture, team, and broader stakeholder ecosystem. The aim is to accelerate their integration and empower them to reach high performance during this crucial initial period, boosting productivity, morale and motivation, strong internal stakeholder relationships and business results. This structured and supportive approach also strengthens the transitioning leader’s engagement, confidence, and self-identity by providing them with greater clarity, a sense of belonging and thriving in their new team and/or organization, and meaningful growth opportunities.

New Leader Transition Methodology



STAGE 1: FIRST MONTH

- Understand and align with the context and culture
- Adapt strengths, style and approach to match role requirements
- Establish relationships with key stakeholders
- Produce a 90-day transition plan outlining priorities, metrics, and important transition actions
- Start the leader team integration process

STAGE 2: MONTHS 2-3

- Identify and achieve quick wins
- Accelerate learning and performance
- Build the leader’s influence, credibility and impact
- Compile a personal development plan to bridge capability gaps and accelerate the leader’s career growth
- Develop a vision and roadmap to build a high-performing team

STAGE 3: MONTHS 3-6

- Amplify and sustain early wins and achievements
- Review progress during first 3 months
- Collect and provide feedback on what the leader should start, stop, continue doing
- Plan and implement a strategy or improvements aligned with the current business strategy

¹⁹ Watkins, M. (2013). *The first 90 days: Proven strategies for getting up to speed faster and smarter*. Harvard Business Review Press.

Help the leader understand the culture, context, and ways of working

It is important for organizations to help new leaders understand the history, culture, assumptions, and unwritten rules of the game. Prioritisation should be given to helping the new leader understand the following areas:

- History and heritage of the business
- Culture, including beliefs, norms and assumptions guiding ways of working and decision-making
- Organizational politics, including power dynamics and decision-making processes of the top team

- The style, interests, likes and dislikes of the top executives (including the CEO and Chairman)
- What type of mindset and behaviours are expected of leaders to stand out and get noticed

As well as providing the new leader with data and documents to aid this discovery process, it is important to provide leaders with opportunities to ask questions to understand different stakeholder perspectives.

Be clear on the development support and resources available

Together with an attractive remuneration package and a supportive boss, access to engaging development and career opportunities is the factor most likely to motivate and retain talented leaders.

It is, therefore, important to clearly signpost learning and development resources, programs and other opportunities that are available to the new leader. These should be aligned with their development goals, learning style and career aspirations. During the first 3 months, the leader's manager should arrange an initial career conversation. The purpose of this is to explore and clarify specific career goals and expectations, development strategies, success measures and establish a cadence of ongoing career conversations. An important aspect of this career

development process is for the leader and manager to align on a development plan to guide the leader's development and growth. During the initial and subsequent career conversations, consideration should be given to specific people who can support the leader. Support roles that should be discussed include:

- i. A mentor (if the leader doesn't already have one or would benefit from a mentor with different experience and capabilities).
- ii. An external professional coach.
- iii. Any internal or external peer development groups, including professional bodies, networking groups and peer learning circles.

Plan regular check-ins and feedback

It is important to schedule regular HR check-ins with the new leader, ideally every month during the first 3-6 months, to check on progress and share any direct or indirect feedback they are hearing. Similarly, the leader's line manager should ensure they maintain a cadence of weekly or fortnightly meetings with the new leader to discuss progress, answer any questions

they may have and provide appropriate guidance, coaching and feedback.

These check-ins and review points are also a good opportunity to invite feedback from the new leader on their experiences, observations, and feedback, including suggestions to improve the team, business, and onboarding process.

Provide expert coaching

New leaders can often feel isolated, and feelings of anxiety, fear and confusion are normal. Expert transition coaches understand these feelings and create a safe space for leaders to reveal their fears, limiting beliefs and vulnerabilities. They can also provide a neutral, non-judgmental sounding board for the new leader to test out ideas and alternative courses of action before taking significant decisions.

By providing a structured process, support, and regular check-ins to discuss progress, organizations will significantly improve success rates for external hires and newly promoted leaders. This will avoid the considerable financial and non-financial costs (including declines in team morale, unwanted turnover, customer losses and reputational damage) associated with transition failures.

How we can help

Our **executive and leadership transition coaching services** provide a confidential and safe space for leaders to navigate their transition challenges. As well as helping transitioning leaders to adapt to their new roles and ramp-up to high performance as quickly as possible, our proven leadership transition coaching methodology helps them develop improved self-awareness, learning agility, strategic thinking, problem-solving, resilience, wellbeing, and relationships within and outside their team.

All our leadership coaches have advanced coaching qualifications together with excellent commercial and transition coaching experience gained with some of the world's most successful companies.



Overview of our typical process



ENGAGEMENT & PRE-BOARDING

- Clarify goals, expectations and context
- Input from sponsor/s and line manager
- Pre-boarding to prepare leader



DISCOVERY

- Leadership and strengths assessments to build awareness and focus coaching
- Discovery meetings with key stakeholders
- 90-day Transition Plan



COACHING & MASTERCLASSES

- Six to nine in-person or virtual coaching sessions
- Optional 1-1 masterclasses on critical capabilities for leaders
- Practical exercises to amplify learning and embed change



TEAM EFFECTIVENESS

- 3-hour New Leader Integration Session with leader and their team
- Team development plan to strengthen team
- Optional team coaching



SUSTAINING PROGRESS

- Progress review with leader and sponsor/s
- Recommendations to sustain progress
- Impact evaluation of coaching

About the authors



James Brook

James is the founder and CEO of TalentPredix Ltd and an executive coach. He has over 25 years' experience working with leaders, teams, and organizations around the world to optimize their talent, performance, and future success.

Before moving into consulting, James held corporate leadership roles in People and Talent Management in the UK and abroad with companies such as Yahoo! and Novo Nordisk Pharmaceuticals. Since moving into talent consulting and assessment design, he has supported leaders and teams globally across many sectors and geographies. Clients he has worked with include Allen & Overy, Commvault, Equinor, Graze, LVMH, Facebook, GSK, Hilton, John Lewis, Novartis Pharmaceuticals, NHS, Oracle, Sainsbury's, Swiss Re, Tesco, WSP and Yahoo! James has founded and run several ventures, including Strengthscope®, an international strengths assessment and development business, that he sold in 2018.

James has a Master's in Organizational Psychology, an MBA, and an Advanced Diploma in Executive Coaching. He is a regular writer and speaker on talent assessment and development, coaching, leadership, and the future of work.



Maddy Lucia-Grace

Maddy is a highly effective executive coach and senior consultant. She facilitates powerful change and enables conscious, authentic decision-making through greater self-understanding, clarity, and commitment to follow-through.

Maddy is a specialist in leadership transition and whole life change. She takes a holistic, integrative approach to coaching, focusing on unlocking the potential, motivations, and strengths of the whole person. Her coaching style is characterized by a straightforward approach, blending keen listening skills with sharp intuition, swiftly getting to the heart of the issues.

Maddy works with clients at an executive level both nationally and internationally, spanning a diverse range of industries such as broking, energy, the charity sector, engineering, coaching and professional services, including clients at Thales, Monster and Atkins.

To find out more about our executive and leadership transitions solutions, contact us today to arrange a meeting.



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About TalentPredix

Using behavioural science, TalentPredix works with organizations around the world to **accelerate business success** and **thriving workplaces** by identifying, developing, and optimizing people's talent and capabilities.

As well as talent management consulting and coaching solutions, the company offers a next-generation strengths assessment system, TalentPredix™, to **discover and optimize people's diverse talents, strengths, and potential.**

Our Purpose

Unleashing **exceptional talent** and **thriving workplaces**

Our Social Pledge

To advance our purpose, we pledge part of the proceeds from the sale of each TalentPredix™ profile to help disadvantaged job seekers gain equal access to job opportunities.



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