



TOOLS

New Leader Assimilation Process

There is always disruption of flow when a new leader joins an organization. The team often views transition to new leadership as a significant emotional event in their work life, given common elements of the pre-existing organization dynamic are likely to change. Once the new leader is on board, the race is on to learn about him/her – to test expectations, values, hot buttons and any other useful information that helps people acclimate to the new leadership style. In turn, new managers want to create a platform for working together, and lead their new team into action.

The New Leader Assimilation is a quick, non-threatening way to get answers to important questions and to openly address concerns the team may have. It's an interactive, facilitated process that accelerates learning, enhances early bonding and re-energizes the team. It provides a venue for validating information, correcting things thought to be true, and expanding on accurate information that needs elaboration. In effect, following the assimilation process becomes the first teambuilding experience with the new leader where team members simultaneously hear his/her responses.

Part 1: Question Generation

The Facilitator seeks questions and concerns from team members relative to the new leader's style, strategic direction, etc. To ensure anonymity, participants submit their questions to the Facilitator. The Facilitator, in turn, compiles all questions/concerns and presents them to the New Leader.

Some of the most frequently asked questions fall in the following areas:

► Personal Style

- Do you have idiosyncrasies that we should know about?
- What should we do if you loose your temper?
- How do you express your satisfaction?
- How can we tell when something is important to you?



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- How often do you want to see us for updates and information?
- What are the ground rules for calling you at home?
- How do you handle disagreements/conflict?
- What are your strong points?
- What are your weak points?
- To what degree do you take risks?

► Communication & Problem Solving

- Do you accept rough drafts or should everything be in final form?
- How should status information be presented?
- What are your preferences relative to email... phone calls... face-to-face?
- How do you send “zingers” to your staff?
- How much do you want to know about a problem?
- How receptive are you to productivity innovations and/or process improvements?

► Decision-making Style

- How far down do you intend to push the decision-making process?
- How should decisions be communicated?
- Is there a negotiation period after you make a decision—when is it over?
- How should we approach you if we have questions/concerns about a decision?





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► Performance Expectations

- What behaviors do you expect of key personnel?
- What is your definition of a top performer?
- When and how will I receive performance feedback?
- How will we know if our performance displeases you?
- What are consequences of not performing?
- Performance expectations for today and going forward?

► Your Priorities

- What is your No.1 business priority in the next six months?
- What are your long-term goals?
- What are your personal career goals?

► Other

- _____
- _____
- _____
- _____





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Part 2: New Leader Reflection

The New Leader privately reviews questions with the Facilitator and reflects on responses. S/he agrees to answer all questions and concerns of the team. Note that some questions may not be answerable! For example, “Why were you selected?” or “When will the organization be done with acquisition work?”

Part 3: Teambuilding Begins

New Leader, Facilitator and Team meet to address the questions. The New Leader works through the list of generated questions. Typically, the New Leader’s answers stimulate further and/or new areas of discussion with the team. The Facilitator may occasionally serve as the interpreter of a particular question/concern in order to protect anonymity of individuals and also ensures all questions are addressed.

As a result of this discussion, additional items may get identified for follow-up that are important to the Leader and team’s success. These items represent the beginning of how the team will function; some actions may be incorporated in the team’s strategic plan.

Part 4: Individual Performance Management

To help the New Leader understand their new employees, one-on-one meetings are scheduled with each team member. To aid in the discussion, team members should come prepared to discuss the following:

1. What I’d like the New Leader to know about me is ...
2. I would say that my own leadership style is ...
3. My single greatest concern is ...
4. The things that get in the way of my doing a better job are ...
5. The changes that need to be made to help me succeed are ...
6. I prefer to receive feedback about my performance ...





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7. To be successful in Carrier South Central, you need to understand ...
8. What requires your immediate attention is ...
9. Policies/procedures and/or strategic issues unique to this organization are ...
10. I consider my department/function's top 3 priorities to be ...
11. What my department/function does best is ...
12. My department/function needs improvement in ...
13. My current individual goals and priorities are ...
14. I consider my individual top 3-5 objectives to be ...
15. I need support from you in ...

Ongoing, periodic one-on-one discussions continue throughout the year.

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