

4 Steps to Design Your Successful Leadership Transition



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The Executive Leaders Resource

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You have positioned yourself for greater things and you are ready to take the next step in your journey. Whether this is something new for you or you have been at it for some time, transitioning into a new higher-level role will mean developing clarity around exactly what it is you want and need. Here are four steps you can take to help you to aim higher, go beyond the competencies you have already mastered, gain clarity and master skills you're going to need to succeed at this next level. Jump start your future – have a plan! Those who do not, plan to fail.

STEP 1 - Clarify Your Vision and Decide What You Really Want.



Envision where you are today, where you want to be tomorrow, and how you plan to get there. What is most important to you? You first want to get clear on your vision and that starts with a clear definition of what you are moving toward. This might include the definition of your priorities, your timeline, and the ways in which you will evaluate your progress. Begin by:

- a. Establishing clear goals and objectives
 - What is the long-term goal?
 - What is the short-term goal?
 - What would you consider as a milestone?
 - If everything went as well as possible, what would be the best possible outcome?
 - What does success look like to you?
 - How will you know that you have achieved your goal?
- b. Assess your strengths and the gaps that are limiting you
- c. Analyze roadblocks and challenges
- d. Identify gap areas and your development priorities
- e. Create a clear strategy and action plan

STEP 2 - Build Relationships and Credibility.

Get to know your boss. You can become highly effective through this. It is about influencing, relationship building, persuading, advising – managing up. Set the tone with the new boss. It is up to you to establish the relationship you want with your manager.

Schedule a conversation within the first week with your new boss to learn:

- a. Leadership style, pressures, strengths, weaknesses.
- b. Organizational priorities, challenges, goals; her priorities, pressures.
- c. Expectations for you, your unit – hers, not yours.
- d. How she communicates best (email, face-to-face, phone, instant messaging, texting); flex to her style, not yours.
- e. What is a win, a success, according to your manager's perspective?
- f. What if anything you can take off her plate to free her up.

And while you are at it, schedule some time to meet with your staff individually, one-on-one. You want to get to know them personally and professionally. Take time to:

- a. Observe how they work, as a team and as individual contributors.
- b. Assess their current roles, skills.
- c. Review performance standards and plans.
- d. Assess the gaps between what your staff does and what needs doing.
- e. Develop your expectations and tell your team what they are.
- f. Sell them on your vision.



STEP 3 - Gather Intel

Educate yourself about the department, the division, the branch. Some of this information can be obtained from organizational literature, the website or by asking others. This information



will be valuable in helping to determine where you and your staff should focus to gain quick wins. You want to:

- a. Understand each department's role, vision, goals, and objectives.
- b. Educate yourself about your new role, the goals and objectives connected to it and your department. Ask your manager for input.
- c. Understand the vision, the direction of the department. (Review the strategic plan).
- d. Learn about the organizational services, processes, procedures, and customers, etc.
- e. Plan visits to any sister or site offices where you might gain a different perspective.

STEP 4 - Network Like Your Job Depends On It - Because It Might.

You want to create a network, a coalition where you will build influence. Get to know key stakeholders, peers, partners, allies, clients, customers; people you have absolutely no influence or power over. Believe it or not, these folks can make you or break you; they actually have a hand in whether you succeed or fail.



- a. Visit other departments, develop relationships with key people outside of your organization. Some of the greatest opportunities come out of these partnerships.
- b. Ask your boss for introductions to key management, stakeholders, customers so that you can begin building trusted relationships. Most of them don't know what you were hired to do, so be the one to tell them. Find out the role, goals and objectives of each of their offices in the organization.
- c. Schedule meetings with department managers to learn their perspectives, identify important issues, needs, concerns, and priorities. Assess their perceptions of how they believe you will support them and/or add value to whatever it is they are working on.
- d. Develop a list of questions to ask at your meetings with each manager and build upon the questions with information gained during those meetings. An opportunity for quick wins could come from the information gained here.
- e. Based on information gained during the meet & greets, develop a list of problems/ issues that can be resolved by you and your staff.

These are the beginning steps to your transition. And it is a lot of work; none of it will happen overnight. But don't give up; keep at it – because the payoff is well worth the investment.

Meeting Questions - Use them to Gain Information and Build Relationships

OTHER LEADERS/PEERS/STAKEHOLDERS/CUSTOMERS/CLIENTS

1. What are your key priorities in the next 6 months?
2. Are you facing challenges where we might be able to help?
3. Are there opportunities for us to partner to achieve our priorities?
4. What have you seen work successfully here?
5. How can we work together effectively?
6. Is there a good way for us to communicate? Does a regular meeting work?
7. What would you like to see improved?
8. Are there leaders who have a similar outlook and are worth reaching out to?
9. Are there politics I need to watch out for?
10. Who is worth reaching out to, to get their perspective? Can you connect the two of us?
11. Are there any upcoming events I should be aware of?
12. Who on my team is delivering really effectively?
13. What type of information do you regularly receive about our department? What would you like to see from our department?

YOUR DIRECT REPORTS

1. You've been great about listening to my ideas, but now I'd love to hear from you. As far as how the team operates, what's been working for you?
2. What significant issues need to be addressed immediately?
3. What are the biggest blockers keeping us from performing to our fullest?
4. What information could I bring you that would help our team perform better?
5. Where do you see the biggest opportunity for improvement with the department?
6. What do you wish you could change?
7. How can I work with you to make sure the team has what it needs?
8. How can I better support you?
9. What can we do to improve our office environment?
10. As a team, is there anything we should START doing? STOP doing?
11. What are some things you'd like to see more of from me?

4 STEPS TO YOUR SUCCESSFUL LEADERSHIP TRANSITION

Design the Roadmap	1 st Week – First Impressions	1 st Month	2 nd Month	3 rd Month – Complete the Plan
Get clear on your vision - where you are today & where you want to go.	What is it that you really want? Short-term & Long-term Goals: 1. _____ 2. _____ 3. _____ 4. _____	Identify your strengths, weaknesses, personal qualities & leverage them. 1. _____ 2. _____ 3. _____	<input type="checkbox"/> Review your goals and assess your performance. Seek your boss' perspective too.	<input type="checkbox"/> Prepare a leadership development plan to fill in the gaps in your skills and knowledge.
Build relationships, and credibility.	Schedule one-on-one meetings with new boss & new team. Expectations: 1. _____ 2. _____ 3. _____ 4. _____	Assess your new team and decide if changes are needed. 1. _____ 2. _____ 3. _____ 4. _____	Map out goals for your team, your office. 1. _____ 2. _____ 3. _____ 4. _____	Assess whether you are meeting expectations. How do you know? 1. _____ 2. _____ 3. _____ 4. _____
Gather Intel and get to know the new environment.	<input type="checkbox"/> Educate yourself about the organization. Dig in and get to know the vision, purpose, mission.	Plan visits internally & externally. Possibilities identified: 1. _____ 2. _____ 3. _____ 4. _____	<input type="checkbox"/> Create an influence strategy for those you are meeting outside of your department.	Map out goals for your office based on knowledge gained. 1. _____ 2. _____ 3. _____ 4. _____
Network like your job depends on it – because it just might.	<input type="checkbox"/> Identify stakeholders, those in position to help you, to share relevant information with you. Plan to introduce yourself to them.	Schedule to meet with key influencers. Names: 1. _____ 2. _____ 3. _____ 4. _____	Prioritize feedback received to secure some early wins for your team and office. 1. _____ 2. _____ 3. _____ 4. _____	<input type="checkbox"/> Take one of the larger issues identified in earlier meetings and begin strategizing a plan that you can implement over the next 30-day period.

Your success is contingent upon developing a personal strategy and **Taking Action!**