

Accelerating Leaders' Transitions: A New Approach to Executive Onboarding

Anne Massaro, Ph.D.
The Ohio State University

Agenda

- Definitions and distinctions
- The business case
- Onboarding at The Ohio State University
- Lessons learned
- Your insights and feedback

Onboarding Defined

- An intentional, structured approach to assimilate new leaders for purposes of leadership effectiveness and longevity.
- A several month systematic approach to developing a strong foundation for success.
- At Ohio State: a twelve-month process with a transition coach ... intended to lay the foundation for extraordinary leadership success...designed to help the new leader build relationships, understand culture, and achieve results at individual, unit, and University levels.

Orientation versus Onboarding

Orientation	Onboarding
Learning the written rules	Learning the written and unwritten rules
An event	A process
Lasts the first month (at most)	May last a full year
Focus is on integration to the unit and the specific job	Multi-level focus: organization, unit, individual (personal)
Linear	Non-linear and non-sequential
Builds on past successes	Includes reflection and unlearning past successes

Business Case: The Cost of a Failed Hire

- Watkins (2003):
 - Studies have shown that more than 40-50% of senior outside hires fail to achieve desired results.
 - \$2.7 million estimated costs to a company of a failed executive-level hire.

Business Case: The Cost of a Failed Hire

- Conger & Fishel (2007):
 - On-the-job development
 - Severance
 - Recruitment
 - Stalled organizational initiatives
 - Loss of business knowledge
 - Damage to customer and staff relationships
 - Dampened employee morale
 - Lost opportunities

Business Case: The Benefits of Onboarding

- Conger & Fishel:
 - Minimize the possibility of derailment
 - Accelerate performance results
 - Facilitate a smoother integration experience
- Kaiser Associates:
 - New leader
 - understands organizational norms and performance expectations
 - integrates into the company
 - is highly productive and engaged
 - Onboarding strategically contributes to company's brand as an employer-of-choice

Business Case: The Benefits of Onboarding

- Watkins (2008):
 - Accelerates the time-to-performance
 - Contributes to talent retention
 - To reap the above benefits, three imperatives must be addressed:
 - Cultural adaptation
 - Political connection
 - Aligning expectations

Onboarding at The Ohio State University

Successful Onboarding: The Foundation for Extraordinary Leadership

Building Relationships	Understanding Culture	Achieving Results
<p>Guide the new leader in building robust relationships with:</p> <ul style="list-style-type: none"> • The person to whom the new leader reports • All of University leadership • Internal stakeholders • External stakeholders (to OSU) • Direct reports • Indirect reports 	<p>Advise the new leader on:</p> <ul style="list-style-type: none"> • Higher education • The state of Ohio • OSU culture (current and aspirational) • Unit culture • How the leader's role integrates with, or challenges, the existing cultures • Assessing the situation in which the new leader will operate 	<p>Dialogue with the new leader about:</p> <ul style="list-style-type: none"> • OSU institutional goals • Stakeholder expectations • Creating integrated, aligned performance goals • Communicating performance goals with the person to whom new leader reports and direct reports • Quick wins

Administrative or “hygiene” factors must be addressed so the new leader can focus his/her attention on the above. See next slide.

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Administrative/hygiene factors to address:

- Parking permit
- OSU ID
- Paychecks
- Enrollment in benefits programs
- Family relocation concerns
- Introductory announcements

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Integrated, collaborative approach, involving:

- Vice President for Human Resources
- Organization Development Consultant/Transition Coach
- Key unit contact – Senior Human Resources manager, direct report of new leader, etc.
- Hiring “manager” (Office of Academic Affairs/ President’s Office)
- Many others in administrative/support roles
- New leader

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Transition Coach - Someone:

- With whom to reflect on onboarding experiences and observations
- To use as a resource for “hard to ask” questions and “hard to find” answers
- To offer perspective on challenges
- To listen, help new leader think differently, and offer constructive feedback
- To assist in the diagnosis of the current situation

Current Situation (Watkins, 2003)

Four broad types of situations a new leader may encounter:

- Start-up – get a new business or product off the ground
- Turnaround – get a group that is recognized to be in trouble back on track
- Realignment – revitalize a unit that is drifting into trouble
- Sustaining success – preserve the vitality of a successful organization and take it to the next level

For best results, a new leader's strategy should match the situation.

Planned Feedback

From Connect the Dots Consulting:

When	Who	What
<ul style="list-style-type: none">• 45-60 Days• 90-120 Days	<ul style="list-style-type: none">• Boss• Self• Peers• Team• HR Partner	<ul style="list-style-type: none">• Cultural fit• Peer relationships• Stakeholder perceptions

Planned Feedback

Our beliefs:

- A newly hired leader needs and deserves timely and respectful feedback.
- We aspire to create a culture of trust and openness in which the giving and receiving of feedback is abundant.

Our intentions (not yet realized):

- Feedback from hiring manager at two months, focused on three emphases of onboarding.
- An electronic survey in which direct reports anonymously give feedback at six months – see next slide. The compiled feedback is delivered by coach.

Electronic Feedback from Direct Reports

Using a 4-point Likert Scale: Strongly Disagree, Disagree, Agree and Strongly Agree

1. <Name of leader> has established an effective working relationship with me.
2. <Name of leader> has established an effective working relationship with his/her entire leadership team.
3. <Name of leader> has established effective working relationships with key stakeholders.
4. <Name of leader> understands the mission of this unit.
5. <Name of leader> understands the culture of this unit.
6. <Name of leader> understands the culture at The Ohio State University.
7. <Name of leader> knows how to get things done at The Ohio State University.
8. <Name of leader> knows what is expected of him/her in this new leadership role.
9. <Name of leader> has successfully transitioned into his/her leadership role.
10. I have confidence that <Name of leader> will be a strong leader for this unit.
11. Comments about items 1-10 or additional thoughts about how successfully <Name of leader> has transitioned into his/her new leadership role.

Measures of Onboarding Success

1. Face-to-face pulse survey – 60 days after start:
 - How is your onboarding experience to date? What's missing?
 - What has been most useful to you?
 - How does the onboarding at OSU compare with onboarding you have experienced at other institutions?
 - What one thing do you recommend occur differently with the next leader we onboard?
2. Electronic survey for new leaders at one year focused on satisfaction with onboarding.
3. Retention at one year and five years.

Electronic Survey for New Leaders

Using a 4-point Likert Scale: Strongly Disagree, Disagree, Agree and Strongly Agree

My onboarding experience, helped me to:

1. build the relationships I need to effectively perform in my role.
2. understand the culture of The Ohio State University.
3. align my performance goals with those of the university and university leadership.
4. learn how to get things done in this institution.
5. match my leadership strategy with the current situation in my unit.
6. build a leadership team within my unit.
7. receive timely feedback from my direct reports.
8. receive timely feedback from the person to whom I report.
9. take thoughtful action as a new leader.
10. personally assimilate.

What has been most valuable to you in your onboarding?

What recommendations do you have for the next leader who is onboarded?

Factors Leading to Derailment

DiBenedetto (2008):

- Unrealistic expectations – the new leader was to solve all of the company's problems!
- Struggle for information – internal networks are lacking; new leader does not know where to access key information.
- Rush to get results – pressured to get results, new leaders act too rapidly or prematurely.
- Mismatch to culture – new leader's style is inconsistent with that of the company.

Factors Leading to Derailment (Cont'd)

- Internal hostility or mistrust of outside individuals
 - new colleagues withhold information or are quick to criticize new leader. This is likely if an internal candidate failed to obtain the position.
- Conflicting messages – new leader hears contradictory expectations.
- Acting on messages received during recruitment
 - new leaders may try to fill a role as described during the recruitment process, missing key obstacles or pieces of information.

Lessons Learned

- Each leadership position requires a unique onboarding plan.
- New leaders talk to one another!
- Establishing relationship between transition coach and new leader must happen quickly, and it often takes courage.
- “Hiring manager” must express the importance of onboarding and validate the time it requires.
- Grasping the culture of OSU for someone unfamiliar with higher education is a large undertaking.

Resources + References

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