The Leadership Transition Process:

How to accelerate change when you’re the new leader of an existing team
Being the new leader of an existing team is like being the new kid on the block.

You don’t know the history. You can’t read all the subtle signs and signals. You don’t know the unwritten rules or the inside jokes.

There’s a learning curve you have to go through. A vetting process. A transition from outsider to insider.

Kids have their own rituals for making this transition.

From sharing a sandwich to getting into a fight. All these new-kid-on-the-block rituals are designed to accelerate the learning curve and integrate the new kid into the neighborhood.

But, this transition process is even trickier for you than for any new-kid-on-the-block.

Why?

Because, you’re the team leader. You’re not any new team member. You’ve got automatic positional power. You walk in with authority. People will pay attention to what you have to say simply because of your title and position. But, they won’t necessarily open up to you right away.

They’ll check you out. Size you up. Try to figure out what makes you tick.

You and your team are going to go through a whole new-kid-on-the-block process.

But, you don’t have the kid advantage – you don’t have any rituals to accelerate the process. That’s where The Leadership Transition Process (LTP) comes in.

The LTP gives you a structured way of accelerating your leadership transition.

It provides you and the team with a simple, step-by-step process for understanding each other and how best to work together – to fulfill your mission and achieve your goals.

The challenges facing you as the new leader of an existing team fall into two major areas.
**Business/Technical challenges:** These include getting up to speed on the current business and technical issues, understanding the strategic goals, and assessing the competitive/regulatory/economic environment.

**Cultural/Leadership challenges:** These have to do with establishing trust, understanding the team’s norms (particularly the unwritten ones), building relationships, and opening up lines of communication.

The Leadership Transition Process is designed to help you and team deal directly with some of the key cultural/leadership challenges that arise at the beginning of a new leader/team relationship.

The LTP consists of a structured dialogue using a list of specific questions and unfinished sentences.

These are designed to break down barriers, accelerate trust building, and clarify issues that are usually discovered only indirectly (and over long periods of time).

**Here’s how it works:**

**Step 1: Let your team know that you want to have a “transition meeting”**.

Do this as early in your relationship as possible. Let the team know that you want to use a structured process to reduce the time it will take to start working effectively together. And that you believe the key is open, candid communication. To that end you will give the team two lists of questions.

One is a list of questions/unfinished sentences that you (the leader) will be answering. In answering these questions you will be helping the team understand who you are as a leader and as a person.

The second set of questions/unfinished sentences are ones that you want the team to collaboratively answer for you. *They need to work together – in anyway that they want – to prepare their answers.*

Show them both lists. But, don’t go over them. This is just done to be transparent.

Schedule the transition meeting (do not wait too long).
Step 2: Hold the meeting

Welcome and thank everybody.

You go first.

You should have written out your answers – as this will demonstrate that you have taken the process seriously. But, don’t pass out written answers. And don’t read the answers. Use your written thoughts as notes. Talk to your team. Make eye contact.

People on your team (and in your organization) pay attention to both what you say and how you say it. So, be prepared. Be real. Be engaged.

When you’re done ask for questions – of clarification. Don’t get pulled off into talking about business challenges, strategy, programs etc. Keep the focus on you, your leadership style, philosophy, and expectation. Let me repeat this because it is very, very important: don’t get pulled off into talking about business challenges, strategy, programs etc.

Then, it’s the team’s turn.

Listen to them carefully. Be open. When they’re done, thank them sincerely. Make a comment about something that particularly struck you or that you particularly appreciate learning from them.

It is good to have some questions. It shows caring and curiosity. Ask questions that are open-ended like, “You said that the team deals with conflict by doing x. Would you tell me some more about that?”

Step 3: Reflect on the meeting & invite continued dialogue

Close the Transition Meeting by asking everyone to reflect on what this dialogue was like for them.

You start.

Talk about what it was like for you. If you were a bit anxious – say so. If you were anxious and excited – say so. In other words talk about what you were thinking and feeling going into the meeting. How you felt during the meeting. And what you’re feeling now.
Then invite each person to share his/her reflections.

It’s important to hear from everybody. You’re modeling something important here – that every voice counts. And that you expect people to be open and engaged.

**Finally, invite people to help you be a good leader by giving you feedback on what you’re doing that is working and what you need to do differently.**

They may not have anything to say at the moment (though they may). If not, encourage people to come to seek you out and help you grow.

Explain that this kind of open dialogue about personal leadership and team dynamics is key to success.

If you have questions about using this process, email me at:

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1. In a sentence or two, what’s your job? (Imagine you’re speaking at a Middle School career day...)

2. What three or four words do you think best describe you overall as a person?

3. What three or four words do you think best describe you on the job?

4. Personally and/or professionally, what are your hopes for the coming year?

5. Personally and/or professionally, what concerns you about the coming year?

6. In terms of your transition to this new job, what do you hope to gain from the change? What will you have to give up?

7. As a leader, what are your major strengths as you understand them?

8. What aspect of your leadership behavior would you like to further develop?

9. What are three or four of your core values? What do they mean to you? (for example, if a core value of yours is “integrity,” how would you define integrity?) How do they play out on the job?

10. What is the hardest thing you have to do professionally?

11. What is the most fulfilling thing you get to do professionally?

12. What are your pet peeves?

13. What are your idiosyncrasies?

14. How do you like to make important decisions?

15. How do you act when you are angry?

16. What do you expect and need from the Leadership Team?
17. How will people know if you think something is important?

18. How will people know if you are dissatisfied?

19. What are the ground rules about calling you at home or after hours in general?

20. If you plant your stake quite firmly on an issue and made up your mind, and someone wants you to re-address the issue, he or she should approach you by:

21. If a someone thinks you’re making a mistake, what specifically should that person do?

22. How do you prefer getting information – orally or in writing? Early, or late in the day, (or some other time)?

23. What are your professional priorities?

24. How do you go about organizing your time?

25. How do you delegate authority and responsibility?

26. How do you feel about conflict(s) within the Leadership Team?

27. How do you typically handle conflict?

28. What will managers and others have to do to earn your trust?

29. What are your initial impressions of the Leadership Team and the Department?

30. What else do you feel are important that everyone knows about?
For the team to answer . . .

1. New beginnings – what we hope to gain by adding the new leader to the team...

2. Our hopes and concerns about the new leader’s transition include...

3. What words or phrases best describe the organization (at this time)?

4. What words or phrases best describe this Team?

5. As we understand them, the strengths of the organization include...

6. As we understand them, the strengths of this Team include...

7. As we understand them, some potential limitations and/or blind spots for this team include...

8. Some of our hopes for the organization in the coming year?

9. What are our concerns about the organization in the coming year?

10. What are some of the core values of this Team? How do they play out on the job?

11. The highest priorities for this Team right now include...

12. Some of the unwritten ground rules the new leader should know about this Team include...

13. What the new leader should know about our decision-making process is...

14. When it comes to conflict on this Team, the new leader should know that...

15. The kinds of things the team does well include...

16. The kinds of things the team doesn’t do as well include...

17. Some things we hope to learn about the new leader include...