



## NEW EXECUTIVE ASSIMILATION

Much depends upon the rapid and smooth assimilation of a new Executive. Achievement of critical business objectives is highly dependent upon the performance of the new Executive as he/she takes on the challenges of leading a pre-existing or newly formed Senior Management team. The critical element of success for the new Executive is the effectiveness of his/her leadership of team dynamics—the team's communications, inter-personal skills and its collaborative problem-solving and decision-making capabilities.

This facilitated workshop process is designed for a recently appointed CEO, COO, President, SVP, EVP or VP as he/she takes on a new leadership role with a pre-existing or newly formed Senior Management Team. **New Executive Assimilation** accelerates the transition from *new hire* to *productive leader* by collaboratively forging alignment between the new Executive and the Senior Management Team in the following critical areas:

- Goal setting and prioritization
- Accountability and measurements
- Problem solving
- Critical thinking
- Conflict resolution
- IQ versus EQ
- Ethics and integrity
- Communications effectiveness
- Leadership style

Whether the new Executive's reports are organized functionally, geographically or aligned by business unit or process, the group must work together effectively to meet business objectives, and provide leadership and model productive behaviors for their own teams. **New Executive Assimilation** develops ***shared goals and measurements***, establishes a high-performance ***leadership style***, and creates the ground rules for ***effective communications***.

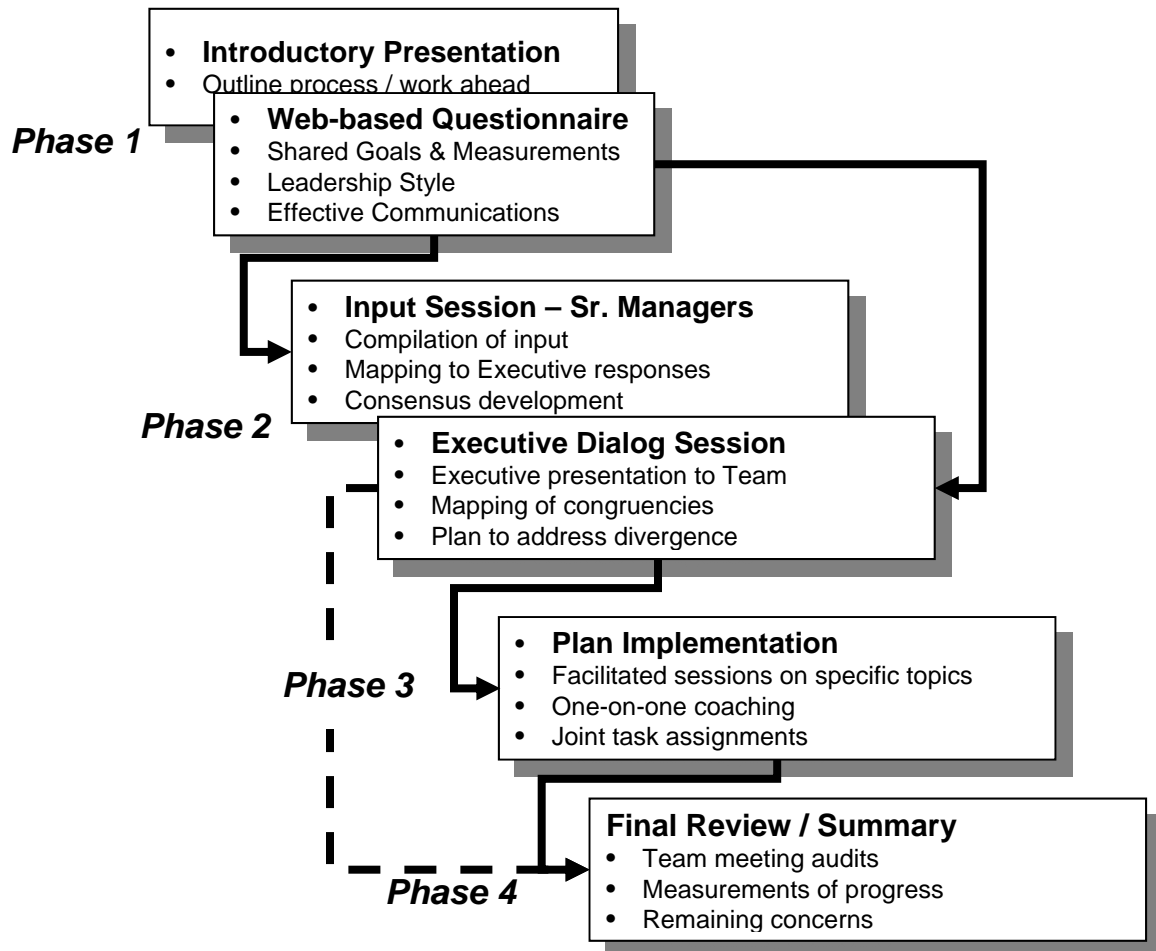
### ***HOW THE ASSIMILATION PROCESS WORKS:***

The **New Executive Assimilation** is a four-phase process that provides the Executive and the Senior Management Team with several opportunities to examine key dimensions for success and collaboratively develop an action plan to capitalize on strengths, correct team deficiencies and achieve team goals. Each phase is custom

designed to meet the specific dynamics of the Executive/Senior Management Team. It is also constructed within the realities of the business environment in which the team is expected to work and meet its on-going operating requirements.

The process has four phases that can be conducted separately or combined as time permits. With some minor pre-work for the Executive and Senior Management Team, the full four phases can be accomplished in one six-hour session.

### The Executive Assimilation Workshop Process



#### Phase 1 - Introduction

Assimilation begins with a brief *Introductory Presentation* to the Senior Management Team and the new Executive. The presentation outlines the goals for the assimilation, the phases to be followed and the work ahead. It also provides an opportunity for the facilitator to note the team’s communications dynamics, a few aspects of the existing culture and any overriding or dominant leadership issues.

Phase 1 then concentrates on the *Exchange of Values, Expectations and Elements of Style* between the new Executive and his/her Senior Management Team in the three key areas:

- Shared Goals and Measurements
- Leadership Style
- Effective Communications

This exchange begins with the administration of a private web-based questionnaire for both the Senior Management Team and the Executive. This work, which takes about 90 minutes, asks a series of questions which are then compiled and mapped between the Executive and Senior Management Team and is most often completed prior to the workshop session. The questions are designed to reveal both foundational alignment and areas in need of improvement.

Below are a few examples from both questionnaires:

**Questions for the Senior Management Team:**

- List three strengths and three weaknesses of the Senior Management Team.
- Name three things you need from the new executive to get your job done.
- If you could wave a magic wand and change one thing about your Senior Management Team, it would be:
- Here are three things I am looking for in my new executive:
- Here is the skeleton in the closet he/she needs to know about to succeed:
- Here are two things the last executive did well:
- Here is the last executive's biggest blunder:

**Questions for the new Executive:**

- List three of your strengths and three weaknesses
- Name three things you need from your Senior Management Team to get your job done.
- The first change I think I may make with this team is:
- My leadership style is best described as:
- Here is my largest area of concern for this team:
- Here are the two accomplishments I am most proud of:
- Here is the biggest blunder I made in my last job:

There are 30 such questions. Both the Senior Management Team and the Executive will answer these in private and without conferring with anyone. The Senior Management Team will be able to answer the questions anonymously. The areas of alignment revealed in the questionnaires are then built upon in the Phase 2 facilitations. They will provide the common ground for addressing any areas where the Senior Management Team and the new Executive diverge in style, values, or expectations.

## Phase 2 – Alignment of Style, Values and Expectations

Two facilitated workshops develop this key alignment. In the first facilitation, the results of the Senior Management Team's survey will be shared with them as a group; without the new Executive. This Input Workshop will draw out any additional issues and organize and prioritize the Team's questions and concerns for the new Executive. The results of this session (usually two hours) as well as the results of both questionnaires are then shared with the Executive in preparation for a collaborative, facilitated Executive Dialog with his/her new team.

The facilitator will tailor the agenda for this second facilitation and brief the Executive on key themes. This Executive Dialog session most often takes two hours, depending upon the range of issues uncovered. Below are example presentation materials from a client Phase 2 Senior Management Input session:

### The Surveys

Team Strengths	Team Weaknesses
Therapeutic knowledge Technical knowledge <b>Clinical knowledge</b> <b>Category knowledge/experience</b> Strategic Results-oriented Well-matched (synergistic)	Insufficient time Overly stretched Direct personalities Independent Not open to new/alternative ways <b>Inexperience with politics</b> Counter culture

### Surveys: Team Leadership

- What I need/want from my new executive:
  - Leadership
  - Vision
  - Support
  - Protection
  - Direction
  - Stand up for us
  - Honesty
  - Motivation
  - Understanding
  - Balance
  - Authority
  - Priorities
  - Feedback
  - Clarity

### BNG Summary Observations

PEOPLE FOCUS	TASK FOCUS
<ul style="list-style-type: none"> <li>• LACK OF CONFIDENCE</li> <li>• FEAR OF CONFLICT</li> <li>• LACK OF ACCOUNTABILITY/COMMITMENT</li> <li>• UNALIGNED PERSONAL + ORGANISATIONAL OBJECTIVES</li> </ul>	<ul style="list-style-type: none"> <li>• JUGGLING PRIORITIES</li> <li>• INEFFECTIVE COMMUNICATIONS</li> <li>• IMPAIRED TEAM FUNCTION</li> <li>• CLINICAL/CATEGORY/</li> <li>• TECHNICAL KNOWLEDGE?</li> <li>• MARKETING KNOWLEDGE?</li> </ul>
<ul style="list-style-type: none"> <li>• SOCIABLE TEAM</li> <li>• SUPPORTIVE OF TEAM COLLEAGUES</li> <li>• ABSENCE OF TRUST</li> <li>• HIDDEN AGENDAS</li> <li>• COUNTER J&amp;J CULTURE</li> </ul>	<ul style="list-style-type: none"> <li>• CUSTOMER FOCUS</li> <li>• STRATEGIC</li> <li>• RESULTS ORIENTED</li> <li>• INATTENTION TO RESULTS</li> <li>• INEXPERIENCE WITH POLITICS</li> </ul>

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During the Executive Dialog portion of Phase 2, the Senior Management Team will hear the new Executive's responses to their prioritizations (a series of "maps" based around each of the critical areas) and see a presentation of the new Executive's own maps based upon answers to his/her questionnaire. The consolidated group will examine and discuss the maps of congruencies and divergences. Through facilitation, participants will work on ways to strengthen the congruencies and address the areas of divergence. Below are examples of client "maps" from the Executive Dialog portion of Phase 2:

**Executive/Senior Management Map 1**

<i>PERSONAL NEED/DRIVE</i>		
Demonstrate ability to understand and motivate others		
Draw on ability to network and develop relationships		

**Executive/Senior Management Map 2**

<i>PERSONAL NEED/DRIVE</i>	<i>ORGANIZATIONAL NEEDS/DRIVE</i>
	Get tasks done and produce results
	Promote those who think strategically
	Increase market share and profitability
	Profit comes first

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**Executive/Senior Management Map 3**

<i>PERSONAL NEED/DRIVE</i>	<i>POSSIBILITIES ARISING FROM SUSTAINING PARADOX</i>	<i>ORGANIZATIONAL NEEDS/DRIVE</i>
Demonstrate ability to understand and motivate others	Lead a project to show that relationship development can have a direct impact on better results	Get tasks done and produce results
Draw on ability to network and develop relationships	Influence senior managers to value networking and strategic thinking by showing that a strategy will be more successful if supported with buy-in gained through networking	Promote those who think strategically
Make a difference to other people's lives	Understand what is most important to customers, and lead developments to meet these needs	Increase market share and profitability
Express passion about environmental issues	Lead the organization's environmental policy and use this as an important marketing message	Profit comes first

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The new Executive and Senior Management Team will jointly develop an *Action Plan* with tasks, milestones and measurements. This plan will lay out the detail for improving or correcting areas of mutual concern. It may be recommended that progress against this plan become part of the new Executive's and the Senior Management Team's performance evaluation/compensation.

### **Phase 3 Implement and Measure**

Each new Executive and Senior Management Team will develop a unique plan, but typically, these include one-to-one coaching with either the new Executive, individual members of the Senior Management Team or both. Other common plan elements include two-by-two (or other small group) facilitated sessions on specific topics, reading

or research assignments, joint task assignments, additional skills training, or facilitated problem-solving exercises.

During Phase 3, the facilitator will measure progress against milestones and follow up with team members if an item has fallen through the cracks or has otherwise become stalled. Adjustments to the plan will be made to accommodate changes in team membership, business requirements or other unforeseen circumstances.

#### **Phase 4 Final Review and Summary**

This Phase is optional and its conduct is dependant upon the issues uncovered during the facilitation process. The facilitator returns to the team—usually within a month of the completion of Phase 3—and conducts a review of assimilation progress. This often involves auditing a meeting or attending a few problem-solving sessions and/or conducting group and individual interviews with the Executive and the Senior Management Team. Improvements, goals, follow-through, measurements and remaining areas of concern are noted and final recommendations made.

If indicated, a written evaluation including recommendations for continued progress and an evaluation of achievements against plan is provided to both the Executive and the Senior Management Team.