Onboarding Executives:
Grasping the Opportunity to Move Senior Teams Forward

Pam Fox Rollin
Executive Coach, IdeaShape
July 21, 2011

Welcome

- Executive coach and consultant to executives and leadership teams in Silicon Valley and beyond. Works with CXO through Director levels in technology, consulting, healthcare, and NGOs

- Guides executive teams to make differences productive and onboard new leaders successfully. Pam's IdeaShape clients have included Accenture, Blue Shield of CA, eBay, LinkedIn, Charles Schwab, Verizon, and a variety of mid-size companies.

- Author of *42 Rules for Your New Leadership Role*

- Featured lecturer and coach for executive education at business schools

The Myth of the Start

3

When We Act on the Myth

Who's Here?

Poll: What's your primary role?

- ❑ HR business partner, generalist, or similar role
- ❑ OD or LD (internal or external)
- ❑ Executive coach (internal or external)
- ❑ Recruiter (internal or external)
- ❑ Executive

Our Focus Today

- **Seeing the opportunity**
  - Enabling new executive success
  - Upgrading senior team effectiveness

- **Grasping the opportunity**
  - Owning the change agenda
  - Forging personal partnerships
  - Raising senior team decision quality

- **Making it happen**
  - Working your avenues of influence
  - Making the most of best resources

Seeing the Opportunity

What if onboarding your next executive strengthened your senior team?

Technology Services Client: "TS, Inc."

What Effective Senior *Teams* Do

1. Coordinate to ensure the most critical **change initiatives** are designed and executed for success

2. Ensure **decision-makers** have insight, info, support

3. Forge top-level **partnerships** across units to facilitate strategy and implementation

Required: right people, focused on right few issues, with sufficient time and effective processes

What Effective Senior *Leaders* Do

1. Enable the overall success of the organization by making the senior leadership team effective
   - Contributing content and market expertise, strategic insight
   - Fostering the conversations for high-quality decision-making

2. Ensure their own function or business unit delivers

3. Collaborate with peers to enable both units to deliver

* Wageman, et al. *Senior Leadership Teams*

What Senior *Leaders* Need

1. Enterprise Leadership Perspective
2. Cognitive Complexity
3. Integrity
4. Empathy
5. Self-monitoring

First four items are from Wageman, et al. *Senior Leadership Teams*

Transplants are Tough

What Often Happens When Onboarding

- New executive swallowed by own-unit concerns

- Cross-functional partners not bought in on initiatives

- Senior team not equipped with time and skill to identify, address, and resolve the issues

New executive is ineffective.

Initiatives are ineffective.

Senior team again lacks stability and defers critical work.

What We Want to Make Happen Instead

- Initiatives led by new leader are sponsored by senior team, and the senior team is strengthened in the process

- New executive onboarded as fully to senior team as to own unit

- Partnerships are forged or improved between peers who will need to collaborate

14

Grasping the Opportunity

What can we do when onboarding executives to help them and the team?

Own the Change Agenda - "TS, Inc."

CFO: "We aren't budgeted for that."

New Hire 1 - COO: "Mission: achieve scale."

New Hire 2: SVP Sales/Mktg: "Fine, I'm focused on selling."

CTO: "Of course our technology scales!"

CEO: "It's your job to scale. Go for it."

Guide the Senior Leadership Team to Own the Change Agenda

- **Lay the groundwork**
  - Describe vision, scope, key groups, risks, value
  - Leave how for later

- **Surface conflict to clarify key issues**
  - Enable the whole team to own the unknowns of the initiative
  - Upgrade how team handles conflict, when possible

- **Charter the change**
  - Clarify what the senior team is committed to so far
  - Include candidates in candid conversation, when possible
  - Hire for needed change leadership capability

Own the Change Agenda - "Health Plan"

- **Success: From Functions to Customer Teams**
  - New head of Sales charged with realigning into teams
  - Accomplished on time, on budget, with union partnership
  - Cross-functional interdependencies handled

- **Why it worked**
  - Senior team chartered the purpose of the change
  - Sales VP candidates considered with change in mind
  - Cross-functional issues acknowledged up front, and opportunities for gains identified and pursued

- **Support for success**
  - Experienced CEO and COO guided the senior team
  - Senior team made time and arranged professional facilitation
  - HR, OD, LD fully engaged at all levels

Forge Personal Partnerships - "TS, Inc."

CFO: "Am I the only professional here?"

ESTJ

Hire 1 – COO: "I'll do it on my own if I have to."

INTJ

Hire 2: SVP Sales/Mktg: "Not so fun here. I'll focus on clients."

ESFP

INTP

CTO: "It's not my job to make nice."

INTJ

CEO: "Can't we all get along? And not talk about it?"

Help Leaders Form Personal Partnerships

- **Encourage 1:1 connections**
  - Set new hire up early, especially with non-interviewing execs
  - Invite internal promotes to make time with new peers

- **Build understanding of motivation and drives**
  - Arrange senior team time: who we are, what we care about
  - Myers-Briggs® assessment - excellent springboard for conversation

- **Coach new hire on strengths and weaknesses**
  - New hires do best applying core strengths*
  - Typically one or two weaknesses must be addressed*

* Rollin, Preliminary Research on Onboarding Experiences of Leaders across MBTI® Type

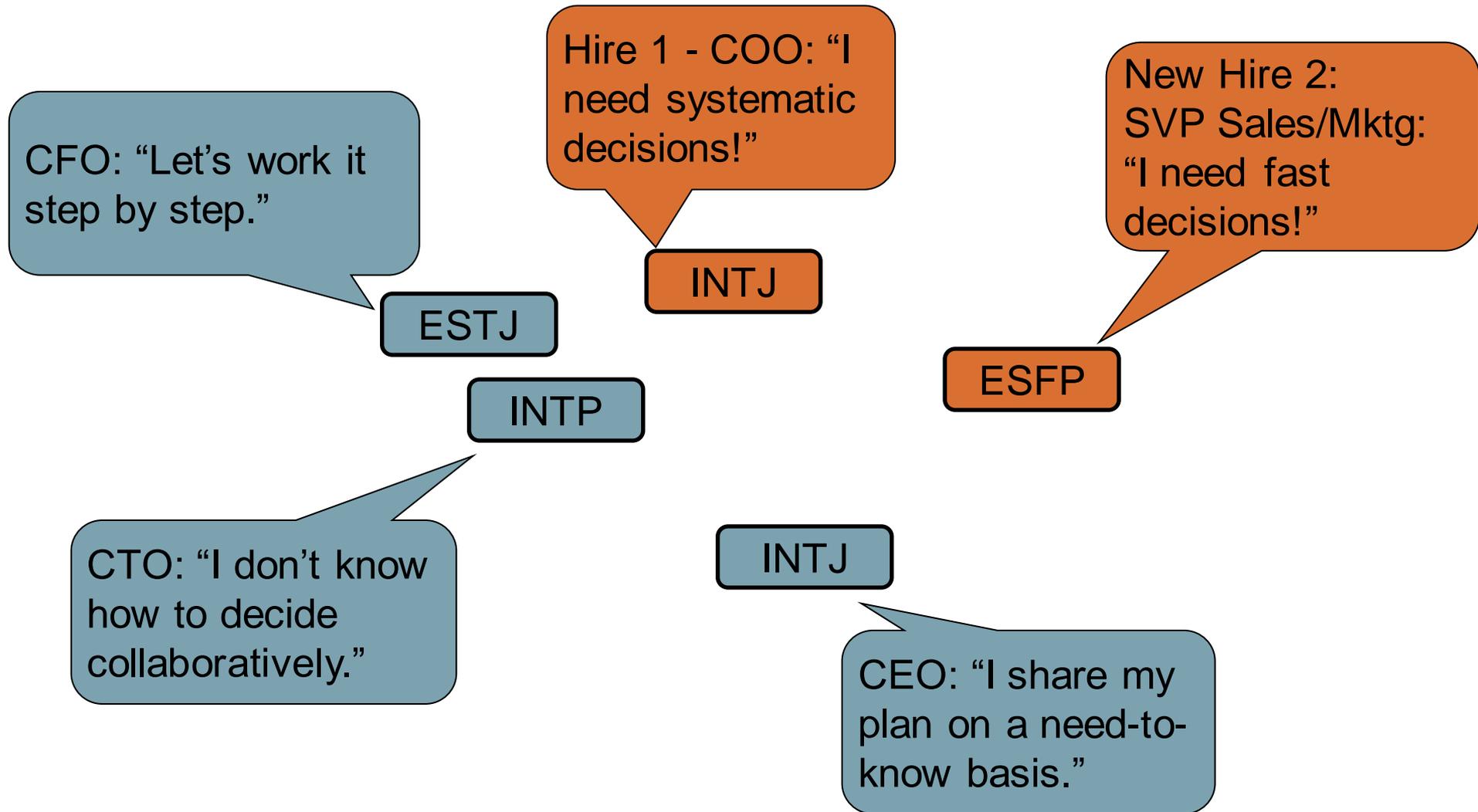# Forge Personal Partnerships - "InvestCo"

- **Success: A transplant that "took"**
  - Senior leaders had median tenure of 12 years
  - Previous attempts to hire in had been unsuccessful
  - Prepared for and hired Sr. VP of Alliances

- **Why it worked**
  - Consult-to-hire
  - Acknowledged relationship gap and made real effort
  - Series of team-buildings reached across the organization

- **Support for success**
  - HR diagnosed situation and created consult-to-hire path
  - Existing leaders took advantage of coaching
  - Facilitated team-buildings reached across the organization

Improve Decision Quality - "TS, Inc."

Hire 1 - COO: "I need systematic decisions!"

INTJ

New Hire 2: SVP Sales/Mktg: "I need fast decisions!"

ESFP

CFO: "Let's work it step by step."

ESTJ

INTP

CTO: "I don't know how to decide collaboratively."

INTJ

CEO: "I share my plan on a need-to-know basis."

Guide Team to Improve Decision Quality

- ## Show the opportunity
  - – Analyze decision record, speed, backlog
  - – Gather stakeholder views and needs
  - – Build case and allies

- ## Make it easier
  - – Work with leader to focus on highest-priority team decisions
  - – Offer and pilot practical decision-making tools
  - – Encourage small decision-making groups, larger advisory
  - – Advocate for clarity

- ## Address the human side of decision-making
  - – Expose leaders to brain science of decision-making
  - – Recognize when status and control issues are triggered
  - – Help individuals develop the skills to participate fully and well

Improve Decision Quality - "Division1"

- **Success: Team embraced restart opportunity**
  - Merger created context for restart
  - Two new executives and division head built support for changes
  - Created new norms that strengthened decision-making

- **Why it worked**
  - Graphic showed "decision velocity" increasing
  - Partnership across old and new to sell team upgrade
  - Senior team envisioned how they'd like to operate
  - Senior team committed the time

- **Support for success**
  - Broad support from HR: hiring, training, coaching
  - Facilitated series of leadership team offsites

Making It Happen

If not you, who?
If not now, when?

You, Change Agent

- Lead from where you are
  - Offer the vision
  - Engage the people
  - Ease the path*

- Analyze opportunities and risks
  - What if we take fresh approach
  - What if we don't

- Work both formal and informal processes

Source: Three-part model adapted from S. Richmond, *Introduction to Type & Leadership*

Your Opportunities

- **Before the new executive starts**
  - Help leadership team map and sponsor change agenda
  - Partner with hiring executives and recruiters to set expectations
  - Arrange support for executive team development
  - Facilitate upgrades in critical senior team functioning (e.g., conflict management)

- **First quarter**
  - Ensure overall effective onboarding of the executive
  - Facilitate partnerships
  - Prepare next round of leadership team development

- **Ongoing**

Resources?

Poll: What resources have you used with executives and senior teams? (check all that apply)

- ☐ *Myers-Briggs Type Indicator ® assessment*
- ☐ *Thomas-Kilmann Conflict Mode Instrument*
- ☐ CPI 260® assessment
- ☐ 360⁰ assessment
- ☐ Other (please note in comments)

Myers-Briggs Type Indicator® (MBTI®) Assessment

- Widely done, vastly underused

- Top tool to support onboarding
  - Engage change sponsors
  - Diagnose/improve partnerships
  - Strengthen decision-making

- Suite of relevant booklets, including *Introduction to Type*® *and…*
  - *Teams*
  - *Leadership*
  - *Change*
  - *Decision-Making*

"When the discussion turns from what Myers-Briggs results tell them about themselves to what they say about others, you see lightbulbs go on in terms of their understanding of the people they work with."
—Nancy Curtin Morris, Marriott's National Director of Training

"We use the Myers-Briggs instrument to dig deeper into conversations and determine the real intent of the persons engaged."
—Mary Beth Ebmeyer, HR Manager, Corporate Development, Hallmark Cards, Inc.

Thomas-Kilmann Conflict Mode Instrument (TKI)

- Simple, powerful map of our preferred approaches to conflict
- Excellent tool for improving team decision quality
- Plays well with senior teams

"The TKI assessment is helping us create an environment that's open to creative solutions to conflicts. We are training our management team first, and will then cascade the training to the rest of our organization."
—*Dorothy Beineix*
HRD Consultant and Trainer
Vision Service Plan (VSP)

"Using the TKI tool with our supervisors helps them understand how to approach their employees in a conflict situation. It makes them aware of different ways of approaching conflict, and to be flexible enough to adapt your style to the situation."
—*Marcela Castagnino, Sr. Training Specialist LAR, Baker Hughes*

CPI 260® Assessment

- Is useful for identifying an individual's strengths and blind spots

- Includes action steps to help set the agenda for self development, executive coaching, and leadership development

- Can be used where the MBTI® instrument cannot: selection, promotion

- When done with an executive team, can add insight into dynamics and identify areas for team coaching

"As a leadership coach, the CPI 260® assessment provides the client with meaningful interpretations of their leadership styles and a compass that informs how they can use these strengths to transform the workplace and create sustainable organizations."
— *Hollis M. Pierce, Educational Consultant and Leadership Coach, Advanced Strategies for Professional Development*
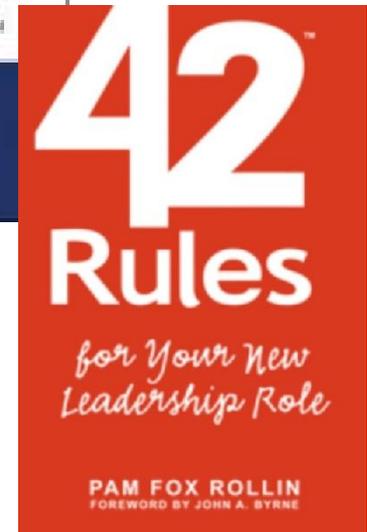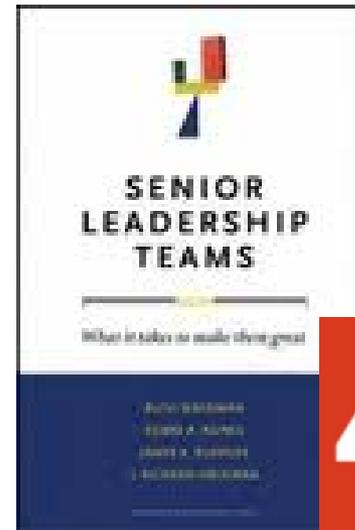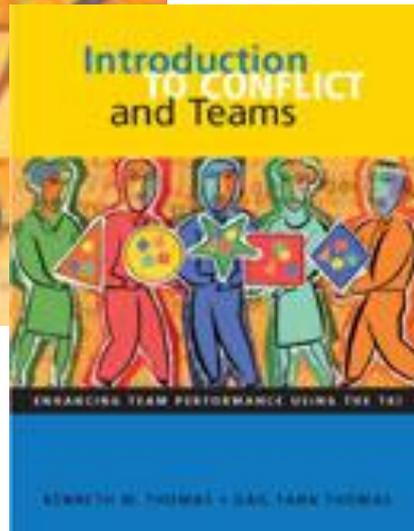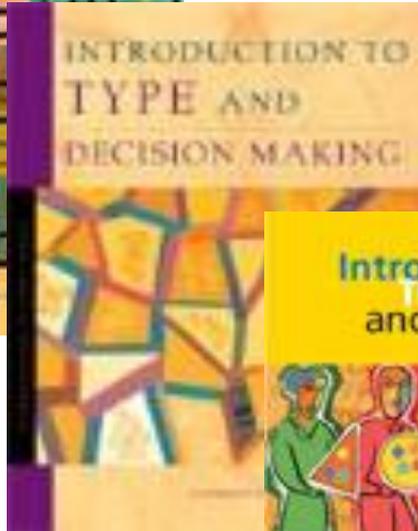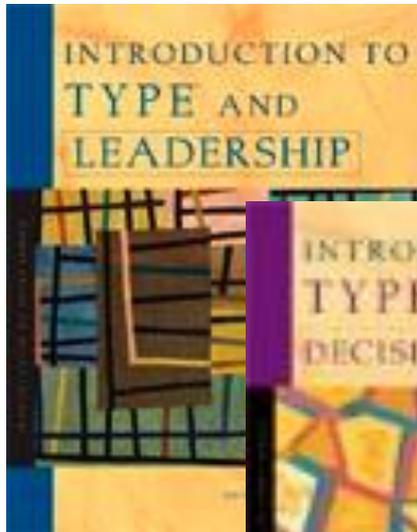
"Combined with the MBTI® assessment, the CPI 260® assessment will yield powerful and predictive information regarding the leadership potential of our candidates."
— *Stephen Paul Santore, Principal, Santore Partners Executive Search*

Recommended Reading

INTRODUCTION TO TYPE AND LEADERSHIP

INTRODUCTION TO TYPE AND DECISION MAKING

Introduction TO CONFLICT and Teams

SENIOR LEADERSHIP TEAMS

42 Rules for Your New Leadership Role
PAM FOX ROLLIN

Where to Start

1. Identify the next executive onboarding opportunity
2. Outline the opportunities and risks… what's at stake?
3. Paint the picture for or with a senior team ally
4. Inventory what's compelling to senior team members
5. Develop high-potential interventions
6. Encourage senior team to agenda discussion of how to advance the success of the team with the next hire
7. Support senior team in taking the next steps

MBTI® and CPI 260® Certification Programs

- Addresses what practitioners need to know to ethically administer, score, and interpret results

- Provides access to purchase and administer the assessment and reports

- Includes a range of learning experiences (lectures, activities, practice sessions, assignments)

- Public program offerings nationwide as well as in-house delivery options

- Qualifies for hours/CEUs from several professional organizations (public programs only)

- Visit www.cpp.com/mbticertification and www.cpp.com/cpicertification

* Note that the TKI assessment does not require certification or education eligibility

Your Questions

- Type your questions into comments.

Thank You

For more information: Pam Fox Rollin

CPP Customer Relations   pam@ideashape.com

800-624-1765

custserv@cpp.com

www.cpp.com