



New Leader Success Formula

A Step-by-Step Guide to Thriving
in Your New Leadership Role

Hilary Potts – The HAP Group

Congratulations on getting started in your new role.

A new role whether it's an internal promotion, job expansion or coming in from the outside requires getting up-to-speed quickly. And most leaders want to find the easiest and fastest path to transitioning into the new assignment and serving the organization.

Over the years, I've noticed consistent themes in successful transitions and learned to be wary of the common potential missteps leaders fall into as they short circuit the entry into a new role.

The *New Leader Success Formula Guide* presents the practical steps to creating your own Transition Playbook. I'll walk you through the key ingredients to get you headed in the right direction. I've included easy to use worksheets to help you map out your new leader transition plan.

To make the most of this guide, I recommend you print out this document and go through each of the exercises.

I wish you the best in your new role and hope these practical ideas and tools help you with your transition.

For more information and ideas, please visit our website www.hapgrp.com or pick up a copy of *The Executive Transition Playbook: Strategies for Starting Strong, Staying Focused, and Succeeding in a New Leadership Role* on Amazon.com. In my book, I cover the entire five-step process to create and implement your Executive Transition Playbook that guides you through the first 90-100 days and beyond.

To your success!



Hilary Potts

The HAP Group



Get Started: Transition Goals and Strategy

Are you adequately prepared to lead yourself and others as you enter a new role?

Expectations are high whether they come from the Board, the market, the new team, senior management or yourself. Too often leaders talk themselves out of a plan. While it may be tempting to jump right in, over time, the lack of a transition plan is a disservice and a risk to you and your company.

Extraordinary leaders know their role is to serve the people and the business. These leaders take the necessary actions to ensure that they are fully equipped to support the business.

This means going beyond the orientation and onboarding checklists typically associated with new leader programs. It starts with assessing and understanding the business situation and getting ready to handle the challenges that lie ahead. Transition goals together with a strategy and plan can provide a structure and focus.

To get started, identify your transition goals and strategy using the following worksheet, "Leader Transition Goals and Strategy." Refer to this information throughout your transition and make adjustments as you uncover more information.

Leader Transition Goals and Strategy

Here is what I know about the business:

I would describe the current business situation as:

My business goals for this transition are:

My personal goals for this transition are:

Based on the business situation, my transition strategy is:

The following leadership principles will guide my transition:

Below is a list of the internal and external associates, groups, and organizations I would like to meet during my transition:

I will use the following strategy to develop relationships and connections with business colleagues:

Here is what colleagues will be saying about me after my first three months in the role:

I will know my transition was successful if...

Communicate Your Personal Brand

When colleagues are clear about what you bring to the role, it's easier to work with you. Knowing what you want to say ahead of time also allows for more meaningful conversations. Keep your messages short and simple and stick to relevant aspects to build credibility and respect.

Personal Branding statements can help you talk about yourself. Sharing your background doesn't mean recounting your whole life. Yes, I have heard seasoned executives go on and on regaling their life stories leaving little time for anything else.

Develop and articulate your personal brand using the following:

Value Proposition — Describe your personal brand and the special value you bring to the business. What can you say about yourself in two to four short inspiring sentences that differentiate your unique talents?

Professional and Personal Background – People will be curious about who you are and why you were chosen for the role. Your background gives people some context and acts as a good conversation starter. Again, it's not your life story, just the nuggets that help people get to know you. Be sure to include stories about what you like to do when you aren't at work.

Leadership Values — One of the best ways to present your leadership approach is through sharing examples and stories about what you value. Then back up your conversations by walking your talk. Choose three to five core values that demonstrate your approach to leadership.

Mutual Expectations — During your initial discussions set mutual expectations for how you will work with others. Focus on mutual expectations for the first 90-100 days and re-adjust at the end of the transition period.

Share Your Message — Finally pull together the relevant stories and messages you will want to share with others to start to build the foundation of where you will lead the area.

Craft your messages using the "Personal Branding" worksheet. Once you are prepared you can use the time with others to explore their background and common experiences.

Personal Branding

My Business Background

Personal/Family Interests and Activities

My Leadership Values

Personal Brand (Value Proposition)

Core Messages or Guiding Principles

Stories to Link Experiences, Values, and Leadership

What You Can Expect of Me

What I Ask of You

Enhance Your Leadership Approach

Entering a new role isn't the time to get complacent or assume your current approach will fit the new position. As roles change, so should your leadership behaviors. A job transition is a good time to assess your leadership and make the necessary enhancements.

Use tools such as a Personal SWOT Analysis to assess your strengths and weaknesses, as well as potential threats and opportunities for growth.

1. Which skills and characteristics do you consider to be your strengths?
2. What are your vulnerabilities or tasks you usually avoid?
3. What trends do you see and how can you take advantage of them in this new role?
4. What obstacles do you face and how might the changing work environment intimidate you? Could any of your strengths or weaknesses lead to potential threats?

Your words and actions can have a significant impact on what others say and do. Every step into more senior roles requires new leadership actions and approaches. Often leaders get stuck working in the same old ways only to find that the approach is no longer effective.

Critically examine your new role, the business situation and the necessary skills needed to be successful. With this knowledge, you will be able to create a "Leadership Plan" which compliments the business situation. Ask yourself:

- What leadership behaviors do I need to start doing?
- What behaviors or actions no longer serve me in this new role?
- What should I continue doing as I move into this new role?

On the following page is the "Leadership Plan." Use it to assess your leadership. As you start new behaviors, it's important to let go of others. It's easy to fall into patterns of behavior that worked in the past; however, these behaviors may not be appropriate in the new role. Be sure to capture these behaviors as a reminder of what to do and what not to do.

Leadership Plan

What is expected of me in this role?

Personal SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats

Leadership behaviors to:

Continue doing

Start doing

Stop doing

My leadership actions to lead in the new organization:

The behaviors I am likely to overrely on, at the expense of learning new behaviors:

Develop a Learning Environment

"The capacity to learn is a gift. The ability to learn is a skill. The willingness to learn is a choice."

Brian Herbert

Don't miss an opportunity to learn about the business whether you have been promoted into a new role, are entering a new company or are expanding your current role. There is always something to learn.

Explore the business from different vantage points -- the enterprise, divisional, regional, or country level. Go beyond your own area and look cross-organizationally to pick up information about how the business operates. Each area of the business may have a slightly different perspective of how things should work.

Go broad and deep in reviewing all aspects of the business, even the areas that aren't of particular interest to you. Before jumping to conclusions, listen to all sides of a topic. The first 90-100 days gives you the unique opportunity to do a full review, which is something you may not have the luxury or time to do later.

These areas when missed can cause challenges down the road. In the early days of a new role, you have permission to get into the details, ask the stupid questions and really explore how the business operates.

I advise clients to talk less and observe more. It's easy to get caught up on the technical aspects and fail to see the emotional and social aspects of how work gets done. The "softer" aspects of the business can actually be the harder areas to navigate especially when leading changes in the future.

Use the "Executive Transition Playbook Activity List" to prepare a list of the areas and topics you wish to learn more about as well as the individuals and groups who can help you with this learning. Create questions to prepare for the many discussions. If you wish to take your actions one step further, map the learning plan across a three-month timeline.

TIP: It's the information just below the surface of a topic that can provide the deep insights to what's working and what can be improved.

Executive Transition Playbook Activity List

Business Element	My Learning Actions	Who Can Help Me?
Mission, Vision, Values		
Objectives, Goals, Strategy, Metrics		
Business Segments, Divisions, Regions, Functions		
Processes and Systems		
Technology		
People and Organization		
Leadership		
Rewards and Recognition		
Communication and Engagement		
Culture		
Business Results and Outcomes		
External Environment		

Incorporate Healthy Practices

Times of transition can be hectic and stressful as leaders move out of their comfort zones. Stepping into a new role and plowing through really isn't a smart option. The new role requires stamina and energy to get up-to-speed.

Below are ten Daily Healthy Practices to keep you physically, mentally and emotionally ready to make the most of the opportunity you have been given.

1. Exercise at least 20-30 minutes a day
2. Get up early and plan your day
3. Eat healthy foods
4. Stay hydrated
5. Sleep at least 7-9 hours per night
6. Regain balance through deep breathing
7. Show gratitude and provide positive feedback to others
8. Find a few minutes of silence and quiet time through meditation and other mindfulness techniques
9. Capture your thoughts and ideas in a journal
10. Take regular breaks from electronic devices

TIP: Identify a few of the above practices. Schedule time in your calendar or business diary.

Make First Impressions Count

Whether you know colleagues well or not at all, use the entry into this position to cultivate solid working relationships.

Too often I see leaders “wing” conversations and lose the opportunity for richer, more in-depth discussions with colleagues.

For each conversation, my clients develop a “Conversation Preparation Plan” just like you would prepare for a customer meeting. The “Conversation Preparation Plan” is a useful tool to prepare for the many one-on-one or group conversations.

For each conversation develop a “Conversation Preparation Plan” just like you would for a customer meeting. Better conversations aid to quickly build credibility, trust, and respect which lead to better business decisions.

Do your homework using the following five steps to cultivate better relationships:

1. **Know Your Audience** — Do some research ahead of time on the people, their backgrounds, and interests.
2. **Topics & Talking Points** — Know what you wish to discuss ahead of time.
3. **Prepare for Questions** — Make good use of the brief time with well thought-out questions and answers the tricky questions.
4. **Reactions & Concerns** — Get prepared to handle the interpersonal and emotional aspects of conversations. How will people react to what is going on around them? What can you do and say that would help them get focused and working productively?
5. **Actions & Follow-up** — A conversation is a terrific first step. What kind of follow-up actions will help to advance the discussions?

The “Conversation Preparation Plan” provides a structure to prepare for the many conversations so you are able to quickly build credibility, trust, and respect which is important to making sound business decisions.

Conversation Preparation Plan

Individual or Group:

General Information

Meeting Purpose

Messages and Talking Points

Reactions and Concerns

Their Questions

Questions to Ask

Actions

Assimilate with the Organization

High performing teams are critical to an organization's success.

As the new player on the team, get acquainted with the associates and how the team currently works before making changes.

Use a Team Assimilation Exercise to facilitate conversation. Ask your HR Professional or an objective coach or facilitator to help you develop and deliver a Team Assimilation Session.

Get to know the cultural aspects of the organization. This knowledge allows you to know where, when, and how to make adjustments that can be owned by the entire team.

The attached "Assimilation Work Session Agenda" outlines how you can prepare and best use time with the team.

Preparing for an Assimilation Work Session

Your Actions:

- ◆ Meet with the facilitator to discuss the agenda.
- ◆ Choose a meeting venue. Make sure it is a place where the participants can fully participate and work without distractions.
- ◆ Send the agenda to the participants and introduce the facilitator to them.
- ◆ Formulate questions to ask the participants.
- ◆ Create a one- to three-page presentation for sharing your background, personal brand, values, and expectations.
- ◆ Agree with the facilitator on the interactive fun, exercises, icebreakers, and social activity for the session.

The Facilitator's Actions:

- ◆ Meet with the transitioning leader to set an agenda.
- ◆ Contact participants to discuss the agenda and the expectations.
- ◆ Gather topics and questions for the session.
- ◆ Work with the transitioning leader on the interactive fun, exercises, icebreakers, and social activity for the session.

Meeting Objectives:

- ◆ Create a safe environment to discuss the opinions on important topics and to alleviate concerns.
- ◆ Exchange information in the spirit of learning.

Agenda for an Assimilation Work Session

Agenda Item	Outcomes
Meeting Agenda and Expectations	<ul style="list-style-type: none"> ◆ Gain clarity and alignment on what the meeting will cover.
Discuss Meeting Agreements	<ul style="list-style-type: none"> ◆ Develop meeting agreements to create a safe environment. ◆ Agree on confidentiality to encourage open and candid dialogue.
Leader Opening Comments	<ul style="list-style-type: none"> ◆ Share leadership background and insights.
Question Generation Brainstorm	<p>Leader's questions brainstorm:</p> <ul style="list-style-type: none"> ◆ Develop questions to ask the participants. <p>Participants' questions brainstorm (led by facilitator):</p> <ul style="list-style-type: none"> ◆ Generate questions and items to ask the new leader. ◆ Topics may include: personal style, approach to business, communications, problem-solving, decision-making style, teamwork, performance expectations, priorities, planned changes, impact of changes. ◆ Prioritize and create common themes. ◆ Determine how questions will be shared with the leader.
Main Session: Question Discussion	Participants and leader share the questions.
Framing Responses	Provide time for participants and leader to prepare answers.
Main Session: Sharing the Responses	Participants and leader share responses to the questions and engage in discussion.
Go-Forward Plans	Discuss agreements. Decide on management processes. Outline accountabilities.
Actions and Next Steps	Discuss actions and next steps.
Communications and Closing Remarks	<ul style="list-style-type: none"> ◆ Identify what will be communicated to those in the organization who weren't in this session. ◆ Leader makes any closing comments.
Team Activity	Include a team-building activity in the session to promote connection.
Postmeeting Follow-Up	Articulate communication action items, team agreements, and management processes.

Communicate Strategically

Your new role signifies a change — staying in touch becomes a key element to focusing and engaging others. People will want to know where they stand, what is expected of them and what happens next.

Don't leave your communication to chance.

During times of change, people need more information, not less. Unfortunately, leaders can fall into the trap of not communicating enough thinking they don't have anything definitive to say.

Communicating “nothing” is communicating something. When smart people lack communication they chart their own course, while others make up their own stories, which most of the time they are wrong. Without proper communication, people lack clarity and productivity suffers.

Create a “Transition Communication Plan” to communicate with others, and don't be shy to communicate the same message several times. It can take an organization time to hear and process the message. Consistent, well thought out communication keeps everyone moving in the same direction.

Transition Communication Plan

Communication Strategy and Key Principles

- 1.
- 2.
- 3.
- 4.
- 5.

Transition Communication Plan

Pre Day 1	0-30 Days	31-60 Days	61-100 Days	Beyond

Get Started: Pre-Day One Checklist

"Before anything else, preparation is the key to success."

Alexander Graham Bell

Get organized and started well before your first day in the new role. I suggest developing your Transition Playbook prior to day one. Below is a checklist of actions you can take to jump-start your transition and be ready for your first day on the job:

- Complete the previous assignment — leave it better than you found it
- Find out everything you can about the company and the business — begin capturing questions, and topics to review when you are in the role
- Incorporate Healthy Practices into your daily routine
- Start developing your Transition Playbook. This includes goal setting, calendar blocking, and the Transition Plan
- Craft Personal Branding Messages
- Assess your leadership and determine how you will approach the new role
- Seek advice and rally key resources that can support your entry
- Map out your approach to learning and assessing the business
- Develop a list of key stakeholders you will want to meet
- Map out your Communication Strategy

To your success!

I wish you the best in your new role and hope these practical ideas and tools help you with your transition.

For more information and ideas, please visit our website www.hapgrp.com or order a copy of *The Executive Transition Playbook: Strategies for Starting Strong, Staying Focused, and Succeeding in a New Leadership Role* on Amazon.com

About Hilary Potts

Hilary Potts, the founder of The HAP Group, is a leadership strategist who advises some of the world's most prominent organizations to create solutions that transform business results through leadership. She is the author of *The Executive Transition Playbook: Strategies for Starting Strong, Staying Focused, and Succeeding in Your New Leadership Role*.



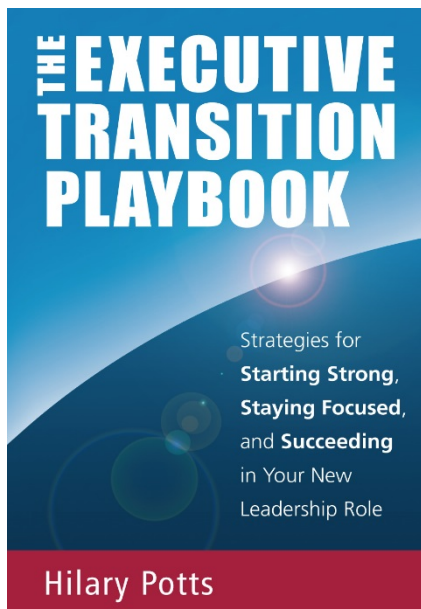
Prior to founding The HAP Group, she served as CEO and President of Continuous Learning Group. She spent the first 15 years of her career at Union Carbide, where she held a variety of sales and business management positions.

Hilary is available for workshops, speaking engagements and one-on-one coaching. She works with organizations as well as individuals to achieve results through leadership.

To learn more about how to successfully transition into a new role and how Hilary works with clients, visit www.hapgrp.com.

THE EXECUTIVE TRANSITION PLAYBOOK

Strategies for Starting Strong, Staying Focused, and
Succeeding in Your New Leadership Role



**Don't just survive your leadership transition.
Thrive in it!**

It's go time in your new executive role, and the pressure is on.

You are expected to get up to speed and add value to the business. *Fast*. As a celebrated leadership strategist and executive coach, Hilary Potts is here to help. She offers powerful principles and practices to achieve a smarter, smoother transition. You will shine at every turn, and will set the stage for success well beyond your transition.

- ◆ **Create a step-by-step plan** to accelerate your learning curve and momentum
- ◆ **Know the classic transition mistakes** and learn how to avoid them
- ◆ **Open communication channels** and build trusting relationships across every level
- ◆ **See even the subtlest warning signs** that your transition is off track
- ◆ **Make clear, conscious choices** in how you want to lead

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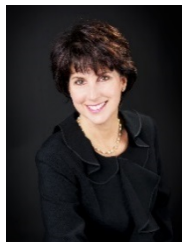
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"Moving into a new role is a big challenge for any leader at any level. Read this book and let executive coach Hilary Potts help to make your leadership transition a smooth and successful one."

— **Ken Blanchard**, coauthor of *The New One Minute Manager* and *Collaboration Begins with You*

"Hilary Potts' new book opens new doors to leaders in new roles, ready for the transition, determined to succeed. This is an essential book for all leaders in all sectors."

— **Frances R. Hesselbein**, President and CEO, The Frances Hesselbein Leadership Institute; 1998 Presidential Medal of Freedom Recipient



Hilary Potts is a leadership strategist, author, and coach specializing in organizational change and executive transition. She is the author of *The Truth About Change: A Leader's Guide to Successfully Executing Change Initiatives*. A former C-suite executive with vast global experience, she helps senior leaders navigate today's intensively competitive business world with success. Visit www.HilaryPotts.com.



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