QWLC

LMS

Executive Transition

Extract

Executive Transition. The period within which transition occurs extends from the announcement that the current executive will depart, through approximately six months beyond the new executive taking the reins. During this period the organization experiences a wide range of phenomena including: decision-making hesitation, trial-and-error action planning, social tension, uncertain priority shifts, program protection, increased workload, and follow-on personnel actions. Productivity among direct-report managers and supervisors declines for approximately six months then regains momentum. Workers on the front line lose confidence in management in the near term only to have it restored in the long run. The new executive is normally in a difficult situation trying to make necessary changes without the loss of loyalty among those people upon whom success depends.

Organizations will often spend excessive amounts on top executive benefit packages and realize slow returns on that investment because transition planning was lax. The Executive Transition is specifically designed to jump start the new "team" quickly and accelerate progress during the same period that dips in productivity normally occur.

Top three benefits:

- **Saves time and delays in staff decision-making.**
- **Helps stabilize programs that might otherwise be in temporary turmoil.**
- **Builds strong relationships among top executive team members quickly.**

The Three Phases of the Senior Executive Transition

Phase 1. Pre-Workshop Activities

Initial Clarity Session. The consulting team and the former and/or new executive meet to set the preliminary agenda and launch Transition Workshop planning. Often, the next senior executive will also attend this meeting initially to set the stage for the dialog. The most significant single task will be to reach clarity concerning the outcomes to be achieved during the Transition Workshop.

Key Staff Interviews. It will be important for the consulting team to interview key staff (direct reports to the transitioning executive). Interviews may last up to one hour each. The intention will be to identify key issues that MUST surface and be resolved during the Transition

Workshop. It will then be in the hands of the consulting team to assure that these issues will be considered in workshop design. All interviews are confidential.

Preliminary Status Report and Workshop Design Approval. A few days prior to the Transition Workshop the consulting team will meet with the old (if still present) and new executives to finalize the agenda and insure that any special concerns are clarified. Final considerations are given to the rites and rituals that may be associated with the formal transition of authority conducted during the Transition Workshop.

Priority Transition Workshop Package Preparations. The consulting team will finalize and distribute any pre-workshop materials that will aid in achieving the outcomes defined. These materials will help participants develop the mindset required for an optimally effective Transition Workshop.

Phase 2. Transition Workshop Topics

Understanding Context. This topic is designed to provide participants with as much information about the mechanics of the positions as possible and eliminate rumors that may have been generated during the pre-transition period. If it is not already known, the context under which the departing executive is leaving must be clarified. People may also want to know, if it is not already known, about the details of the selection criteria and "charter" for the new executive. Normally, a new executive is "chartered" to at least "maintain stability" or "create innovation."

Team Style Advantages and Shortfalls. Any preferred model can be used to fill this need. Our traditional preference is the **RGB**. The intention is to create an image for the new executive of the styles of those currently on the staff. At the same time, the staff will become familiar with the styles of the new executive and each other. This topic will clarify behaviors that might otherwise take months or years to figure out.

The Organization Culture - Current and Future. One or both of two methods can be used to provide the impetus for dialog concerning the current and future worklife culture of the new executive's organization. The first method entails the use of a subjective data collection effort. The second method uses a more quantifiable data collection effort that involves a larger group, not all of whom will be attending the transition workshop. In either event, the Unifying Human Systems model **(UHS)** is used to create the worklife culture image and provide an underpinning to jump-start planning.

Priority Formulation. At least two categories of priorities are formed during this session: management team and organizational priorities. The first category is designed to tighten the management functions that will create a new management team culture, while the latter category is designed to provide immediate progress toward shifting organizational goals. Both these categories are normally required to assure an effective transition.

Role Clarity. It is not unusual for a new executive to shift the roles of individuals in an organization to better accommodate the style and priorities that shift with his or her arrival. It is important to get these new roles clarified early in the transition. Time should be set aside for these role transitions.

Organizational Forecast. Everyone participating in the Transition Workshop will be encouraged to predict future events that will have a significant impact on the organization and the organization's ability or capability to respond to those events/conditions based on the shifted roles and expectations. Participants will be encouraged to declare their requirements to assure success in future endeavors and potentially negotiate the general resources required.

Commitment. If appropriate, all participants will be asked to declare a commitment to achieve the goals and objectives outlined during the transition workshop. The level of detail in the declaration ought to be negotiated in advance.

Phase 3. Post-Workshop Activities

Milestone Responsibility Checklist. The transition consulting team will provide a checklist for participants that outlines the commitments made during the Transition Workshop along with transcribed charts created during the workshop.

Final Report. The transition consulting team will provide the new executive with a final report that includes recommendations for achieving established outcomes.