

# Executive Transitions and Onboarding in a Crisis



Even in the best of circumstances, leadership transitions are tough. Failure rates are estimated at 40 percent, and it often takes 6 months or longer for a new leader to get to breakeven productivity levels.

Today, as leaders are operating in the most challenging circumstances most have ever faced, executive transitions are even harder. If organizations don't change the way they welcome in new executives, it is safe to assume that failure rates will rise.

What can companies do to improve the likelihood of executive transition success, and help executives hit the ground running and get up to speed? Below are seven common challenges and recommended solutions from our experts. The complexity of internal transitions should not be underestimated and these challenges and solutions apply to internal appointments as well as external appointments.





### **Challenge 1: Hurdles to virtual onboarding are higher**

Developing a thoughtful, well-run onboarding program is a challenge, and it is only harder when done virtually. An onboarding program needs to be substantive and informative, and it needs to enable relationship building and both short- and long-term success. All of this is complicated by current realities, and the fact that experiences that traditionally would have taken place face-to-face, or in a given location, now must be done by individuals who are working separately, or unable to visit offices, facilities, and clients.

Start early and move fast:

- Start onboarding planning when you start interviewing candidates. Think about what projects you want them to work on, what relationships you want them to develop, and what quick wins you want them to achieve.
- Map out all of the activities that take place through the onboarding that you would traditionally have designed to be done in person. Start working with others to figure out how to create workaround practices.



### **Challenge 2: Lack of support and difficulty accessing information**

Under normal conditions, leaders in transition often articulate that there is a lack of support and information available to them early in their transition, at the time when they need it to advance their understanding of the business and their role. Much of the information leaders need when they move to a new organization is obtained through interactions with existing staff. While there are often large amounts of written information, the real insight of “how things work around here” is not written down. Limited access to people, especially face-to-face where people are more comfortable sharing this information, will inhibit a leader’s ability to get up to speed.

Build a dedicated support network:

- Identify and build a dedicated support network for the new executive that provides a 360 degree view of the organization – consider including key direct reports, peers, their boss, and a senior HR or Communications leader.
- Invest time in defining and enabling the role of each member of that network, and create mechanisms for holding those individuals accountable.
- Provide the new leader with additional support to navigate the organization’s stakeholder landscape. A comprehensive stakeholder map is an excellent starting point which should provide a detailed overview of key stakeholders, insights and challenges the leader will have to navigate.



### **Challenge 3: Key rapport-building methods lost**

The favored method of building rapport in early relationships is still in person. Some leaders who are entering a new role where the workforce is remote will struggle if they are unable to connect to their team, clients and stakeholders face-to-face. This extends to group presentations, townhalls and other mass meetings where a new leader gets to sell themselves and their vision. Leaders who rely on their ability to communicate in-person may struggle in the new remote working environment to build the confidence across the organization needed to be effective.

Enable relationship building:

- Help your new executive by prioritizing virtual face-to-face meetings over phone calls to enable the same level of in-person relationship building opportunities, for both formal and informal meetings.
- Provide new leaders with a structured set of questions they can use during early interactions to help them build relationships and get the information they need.
- While there will be significant pressure for your new executive to focus communications on the pressing business needs facing the organization, encourage them to move beyond this and to provide equal focus on building deeper relationships and showing authenticity.
- The executive's support network should help them design and test messaging and communication plans, as well as prepare for important stakeholder meetings.



#### **Challenge 4: Decision making is sped up**

For some leaders, joining their new organization in this crisis will be akin to joining a business in a severe turnaround. Out of necessity, decisions are being made quickly. For the new leader, this poses the challenge of needing to be decisive at a time when they lack both the historical and current organizational information to feel confident in the decisions they make. This opens them up to mistakes and significant stress and anxiety.

Help leaders achieve an “even faster” mindset:

- Providing more information to the leader will be critical. This could involve pulling together a comprehensive package on the state of the business, a current state SWOT analysis and a preliminary set of priorities that will need to be addressed shortly after the appointment.
- Openly acknowledge that you are aware they are working without much of the information and support needed to make the best decisions possible given the circumstances.
- Make a concerted effort to align on critical challenges and opportunities facing the business in advance of the appointment and take up responsibility for information gathering that might fall on the new leader's shoulders during the early months of their transition.



#### **Challenge 5: Demonstrating value is slowed down**

In other organizations everything (decisions, investments, initiatives, etc.) is slowed right down. The challenge here is that leaders in transition often focus on early wins and making an impact. Some leaders will be challenged by the lack of opportunity to demonstrate value, which may impact their levels of confidence and stress.

Caution patience where appropriate:

- Openly discuss the pressures of performance and momentum that the new leader may be experiencing, and structure their transition plan around realistic deliverables to help build confidence.
- Recalibrate transition expectations considering the current business context and agree on 3-, 6-, 9-, and 12-month scorecards.



### **Challenge 6: Assessing the team is (even) harder when remote**

A key task for new leaders is to assess their team for performance, capability and alignment with the intended strategy. The challenge with assessing teams during the current environment is firstly that this will happen remotely, and secondly that during crises some people rise while others struggle. It will be very difficult for any new leader to get a gauge on how their team behaves and performs in normal conditions if they have inherited them during this crisis.

Leverage resources and set expectations:

- New executives should be given past performance reviews and be connected to others who can provide feedback on team members.
- The new leader should be encouraged to quickly recalibrate expectations for performance and continuously communicate this to the team and broader organization.



### **Challenge 7: A growing sense of isolation**

It is lonely at the top – and even more so when a leader is new and working remotely. They don't have established relationships, a network of peers, or even a strong understanding of who does what and where in the organization. New leaders need a strong helping hand in their early days to fight away the inevitable feeling of isolation, and to quickly get them involved with their teams and the business.

Deliberately establish connections:

- Keep new executives busy, even at the risk of overscheduling them. Their time shouldn't be wasted, but instead focused on getting them involved quickly in substantive projects.
- Establish a buddy system early on, where the new hire has someone above them, equal to them, and below them who they regularly interact with. Make it clear to those individuals that they have an important role to play in determining the new executive's success or failure.

### **Putting it All to Work**

These are unprecedented times and for senior leaders who are transitioning during this period, the challenges, as well as the risks, are increased. Looking through this crisis, there will be a new normal and the executives you have, and will recruit or promote, will be a key part of your future recovery. Increased support will help to ensure they survive their transition and are not only still in place but are well positioned to help drive your organization's recovery and growth after the current challenges subside.

## Checklist: Onboarding in a Remote Environment

### Before Onboarding: Building a Strong Foundation

- This is a new relationship and needs to be purposefully managed: Inform the candidate of the expectation that all work will be remote for the foreseeable future. Inform them of how the company's team plans to connect, engage and enable them to succeed.
- The ability to communicate and transact data is critical to Day 1 as an executive: Ensure laptop, cell phone and other hardware are prepared well before start date. Establish a single point-of-contact for technical support. Also identify an internal colleague who can be first point-of-contact for "simple" questions about general operations.

### 1st Day: Getting Connected

- The relationships formed on this day are critical to engagement, loyalty and ramp-up for the new executive: Stick to the onboarding plan and schedule. Pre-scheduled meetings with the new hire should be treated as critical to the business. Provide real-time update on status of the business, revisions to strategy/plans, and key learnings from this situation.
- Communicate details around business strategy, operations, crisis management plan, etc.: Have direct reports spend at least 1 hour with new executive to communicate the overall situation at hand and ensure group alignment.

### 1st Week: Building the Foundational Network

- Establishing a foundational network of stakeholders is key to creating consistency and engagement for the executive: Hiring Manager should conduct check-ins with appropriate stakeholders to confirm connectivity with the new executive. Hiring Manager should also check-in with new executive at week's end to get a pulse for overall onboarding success, consistency of messages communicated from other stakeholders, new concerns/perspectives, etc.
- Communicate details around business strategy, operations, crisis management plan, etc.: Have direct reports spend at least 1 hour with new executive to communicate overall situation at hand and ensure group alignment

### 1st Month: Solidifying Relationships

- Provide avenues for executive to have near-term impact and deliver value (direct and indirect) to establish brand and rapport: Ensure executive has clear expectations and a platform for communicating identified issues, proposed solutions, ideas, etc. Hiring Manager should check-in with new executive at month's end to get a pulse for overall onboarding success, consistency of messages communicated from other stakeholders, new concerns/perspectives, etc.
- Communicate details around business strategy, operations, crisis management plan, etc.: Have direct reports spend at least 1 hour with new executive to communicate overall situation at hand and ensure group alignment. Confirm the executive has established relationships and rapport to independently drive meetings, connections, and activities forward with limited support.

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