



Executive Onboarding & Team Realignment

What is Executive Onboarding & Team Realignment?

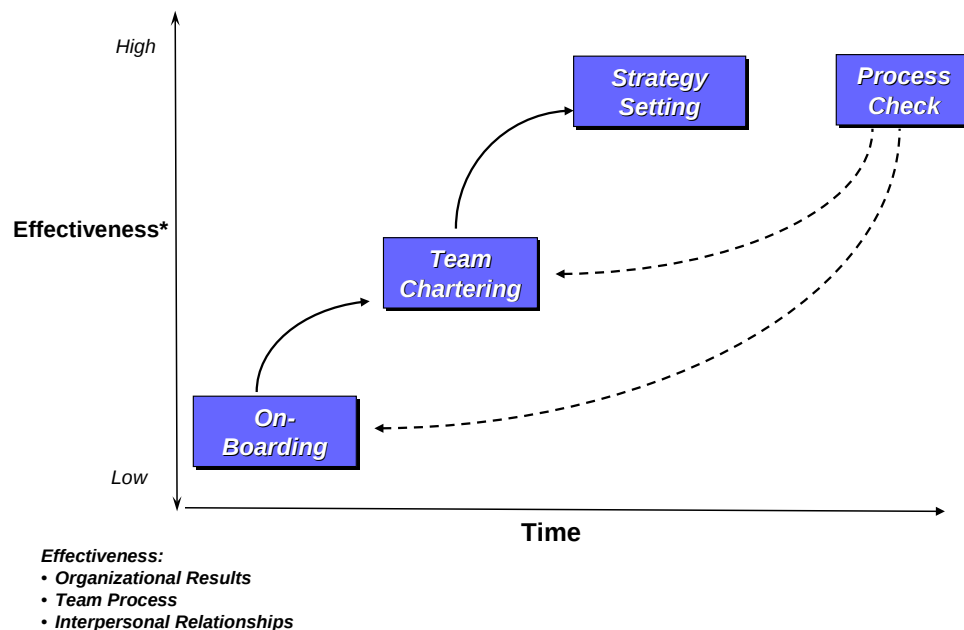
A structured dialog between a new executive and their staff focused on creating mutual understanding between all parties and creating action plans with accountability placed on both the leader and the team.

A deliberate process in which a new leader works with a new or existing team to shape and define the vision for the team and organization and jointly develop a plan to achieve that vision.

Our Beliefs:

- ▲ Effective onboarding is never accomplished in a single discrete event.
- ▲ Early dialog and feedback is crucial in creating effective patterns, interpersonal relationships and networks
- ▲ In the circumstance of a new Leader to an existing team, navigating and adapting to the new relationship needs to be a deliberate act. People need to transition through a loss of what is/has ended through to an eventual resignation/delight about what is beginning.
- ▲ Creating a safe environment in which team members can hold the conversations that are important to be had is critical to the success of all working together.
- ▲ People want to be involved, do their jobs well and are motivated by feeling like a valued contributor. Employee engagement and collaboration are critical to success of executive onboarding.

Our Approach:



Onboarding

A structured process to create a dialog between the leader and their staff focused on creating mutual understanding between all parties and creating action plans with accountability placed on both the leader and the team.

Stakeholder Involvement:

The leader and all direct reports/team members would participate in one-on-one (“ethnographic”) interviews to gather perceptual data/descriptions about the current situation in order to identify any issues that will need to be considered to forward the work of the team. Data gathered will be used to refine and focus the Onboarding event and, as appropriate, plan next steps to ensure success of the entire process.

Logistics:

- ▲ 1 day session.
- ▲ Structured dialog covering:
 - Preferred working styles
 - What is working/not working (leader/team and within the team)
 - Issues/concerns
 - Big picture vision of desired state for team and organization.

Team Chartering & Vision

A structured process to create a dialog between the leader and their staff focused on re-defining and chartering the team needed to achieve desired state of the organization.

Stakeholder Involvement:

The leader and all direct reports/team members would participate. Pre-work would be given so that all can come to the session and participate and maximize idea generation.

Logistics:

- ▲ 1.5 to 2-day session
- ▲ Structured dialog and planning session to:
 - Identify and create an understanding of the shared values that will underpin the team’s work.
 - Create a shared vision of what success will look like in two years.
 - Agree on the team’s purpose and set of goals.
 - Establish desired end results with objectives that spell out specific short-term actions and activities to obtain those results.
 - Identify and understand each other’s skill sets and gaining clarity around any additional skills that will be necessary for team success.

Strategy Setting & Planning

A structured process to create a dialog between the leader and their staff focused on formulating an organizational strategy and to define a strategic plan to facilitate the implementation of the strategy.

Stakeholder Involvement:

The leader, all direct reports/team members and key stakeholders would participate. Pre-work would be given so that all can come to the session and participate and maximize idea generation.

Logistics:

- ▲ 1.5 to 2-day session.
- ▲ Structured dialog and planning session to address:
 - Strategy Formulation
 - Situation analysis.
 - Objective setting.
 - Strategic plan – how to achieve objectives.
 - Strategy Implementation
 - Creating a resource allocation plan.
 - Establishing structure and governance.
 - Assigning accountability to teams and or individuals for specific tasks.
 - Identifying critical points of change -- strategic inflection points.

Process Check

A structured dialog between the leader and their staff focused on examining the effectiveness of agreements previously made and to adjust working and/or tactical activities as appropriate.

Stakeholder Involvement:

The leader and all direct reports/team members would participate. Pre-work would be given so that all can come to the session and participate and maximize idea generation.

Logistics:

- ▲ ½ day session.
- ▲ Structured dialog to address:
 - Onboarding Actions
 - What's working / not working.
 - Action plan to adjust.
 - Team Charter / Vision Actions
 - What's working / not working.
 - Action plan to adjust.