Exploring Transition and Success in Your New Role

Dominic Greene and Melissa Kish
Presenter Information

Dominic Greene

Melissa Kish
About The Program

• Transitioning to a new role
• Working with your supervisor
• Securing Early Wins
• Defining Success
The First 90 Days
Michael D. Watkins
So you have a new role……

Your goal in every transition is to get as rapidly as possible to the breakeven point. This is the point in which you have contributed as much value to your new organization as you have consumed from it.
Transition Tips

- Sticking to what you know
- Falling prey to the “Action Imperative”
- Setting unrealistic expectations
- Attempting to do too much
- Coming in with the answer
- Engaging in the wrong types of learning
- Neglecting horizontal relationships
Using your first 90 days as a planning horizon...

-If you are lucky, you will get some lead time between the time you learn of the position and actually getting hired.

-Start planning what you hope to accomplish by specific milestones...
Key Transition Milestones

- Learning you are being considered →
- Learning you have been selected →
- Formal entry into the organization →
- End of First Day →
- End of First Week →
- End of First Month →
- End of Second Month →
- End of transition period/90 days!
Transition Risk Assessment

- Moving into new profession/industry
- Joining a new organization (campus/headquarters/org)
- Moving to a new unit/office/department at the same institution/org
- Moving geographically
- Leading former peers

- Moving to a different functional area
- Taking in a cross-functional role
- Taking on a newly created role
- Having to do two jobs at one time
- Entering when change is happening everywhere
Preparing Yourself
Onboarding into a new organization…

- Joining a new organization is akin to an organ transplant…and you’re the new organ.

- If you are not thoughtful in adapting to the new situation, you could be attacked and rejected.
Why new people do not succeed...

- Not familiar with informal networks and communication
- Not familiar with culture and how to navigate it
- New people are unknown and do not have the same credibility
- If the organization is not used to external hires
So you are here….now what?

- **Business Orientation** - learn everything/anything about your department/division/institution. Learn about the university/organization as a whole and not just your department or functional area.

- **Stakeholder connection** - Identify key stakeholders/relationships above you, horizontally, and support staff.

- **Expectation alignment** - What do others think are top priorities? What are your mandates? What does support look like? Resources?
  - Recruitment is like romance…employment is like marriage.

- **Cultural adaptation** - Understand departmental/divisional culture. How do people think, communicate, act? What are the values/shared assumptions of the department? What are the shared language/acronyms/traditions?
Identifying Cultural Norms
Preparing Yourself

- Clear Breakpoint
- Assess your vulnerabilities
  – Problem Preferences
- Watch out for your strengths
- Re-learn how to learn
- Rework your network
- Get some help
Preparing yourself is a journey and not a destination
Negotiate Success
Negotiate with your supervisor to establish realistic expectations, reach consensus, and secure resources.
## Focus on fundamentals: Dos and Don’ts

<table>
<thead>
<tr>
<th>Dos</th>
<th>Don’ts</th>
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<tbody>
<tr>
<td>Clarify expectations early &amp; often</td>
<td>Don’t stay away</td>
</tr>
<tr>
<td>Take 100% responsibility for making it work</td>
<td>Don’t surprise your boss</td>
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<td>Negotiate timelines</td>
<td>Don’t approach only with problems</td>
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<td>Aim for early wins</td>
<td>Don’t only run down your checklist</td>
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<td>Pursue good marks</td>
<td>Don’t expect your boss to change</td>
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Planning for five conversations with your supervisor

Situational diagnosis
Expectations
Resources
Style
Personal development
Planning for the conversation…

Situational diagnosis
Planning for the conversation…

Expectations
Planning for the conversation…

Expectations

• How do you clarify & align expectations?
• Match expectations to situation
• Identify untouchables
• Educate your supervisor
• Under promise and overdeliver
• Clarify, Clarify, Clarify
Planning for the conversation…

Resources
Planning for the conversation... Resources

Financial/Budget
Technology
Space
Political support
Shared resources

Staffing
Higher level support
Change management
Open to growth
Decision making
Planning for the conversation...

Style
Planning for the conversation…Style

Diagnose your supervisor’s style
Scope out dimensions of your box
Adapt to your supervisor’s style
Surface the difficult issues
Planning for the conversation…

Personal Development
Planning for the conversation...Personal Development

- 90 Days Check-In
- Be comfortable asking for feedback
- What do you need for the rest of your first year?
- Open opportunities for growth and PD
- Improve skills on: cultural & political diagnosis, negotiation, coalition building, and conflict management
Negotiating your First 90 Days Plan

Create buy-in from your supervisor in the following areas:

- Priorities
- Goals
- Milestones
Negotiating your First 90 Days Plan - in stages

First 30 Days

Next 30 Days

Final 30 Days
Securing Early Wins
<table>
<thead>
<tr>
<th>Stage</th>
<th>Transition</th>
<th>Entry- 3 months</th>
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<tbody>
<tr>
<td>Stage 1</td>
<td>Transition</td>
<td>Entry- 3 months</td>
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<tr>
<td>Stage 2</td>
<td>Immersion</td>
<td>3-6 months</td>
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<tr>
<td>Stage 3</td>
<td>Reshaping</td>
<td>6-9 months</td>
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<tr>
<td>Stage 4</td>
<td>Consolidation</td>
<td>9 months-?</td>
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Each Stage has Phases

- Learning
- Designing Changes
- Building Support
- Implementing Changes
- Observing and Assessing Results
Step 1: Behavior Change

- **Lack of Focus** – resources spread too thin, putting out fires instead of endearing solutions.
- **Lack of Discipline** – There are great variations in levels of performance of the team. There is a lack of understanding the negative consequences of inconsistency and people make excuses when they fail to meet commitments.
- **Lack of Innovation** – Group does not compare itself with others, and employees rewarded for stable but not trying new things.
- **Lack of Teamwork** – People compete and create fiefdoms rather than work together to achieve common goals.
- **Lack of Sense of Urgency** – Ignore the needs of internal and external stakeholders and are complacent.
Step 2: Adopting Basic Principles

• What matters?
• Integrity
• Culture
Step 3: Identifying Early Wins

- Credibility
- Engagement
- Planning vs. learning
- Plan for surprises
Determining Success

• **Self-Reflection**
  – How did you feel success is defined?
  – Do you need external validation?
  – Does this match current role and organizational priorities?

• **Work-Life Balance**
Questions & Answers

Melissa Kish- melkish@Indiana.edu
Dominic Greene- dominickgreene@gmail.com
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