Checklist for Successful Leadership Transitions

16 Things to Get Right in Your New Role
New leaders face an overwhelming number of tasks during their first few months, but many are unsure what to prioritize.

In a recent study targeting 6,000 newly transitioned executives, we identified the actions leaders should take to boost their likelihood of success.

**Four Critical Focus Areas**

- **Improving Organizational IQ**
- **Creating Role Clarity**
- **Forming Connections**
- **Shaping the Future**

Source: CEB analysis.
### 16 Things to Get Right in Your New Role

#### Improving Organizational IQ

1. **Identify Key Industry-Driving Forces**
   
   Understand the key driving forces impacting your company’s business.

2. **Align Leadership Style**
   
   Understand how your leadership style aligns with your team’s performance and the styles of your peers.

3. **Understand Functional Trends**
   
   Understand how macro trends are affecting your function’s role and practices.

4. **Assess Functional Performance**
   
   Assess your function’s performance, and understand your strengths and weaknesses.

5. **Evaluate Team Competencies**
   
   Define the competencies that will drive high performance, and measure your staff against them.

#### Creating Role Clarity

6. **Clarify Performance Goals**
   
   Agree on personal performance goals for the short, medium, and long term.

7. **Understand Transition Risk**
   
   Fully understand your transition risks and where you need support.

8. **Plan the Transition**
   
   Develop a transition plan that takes into account your situational and cultural risks.

9. **Obtain Transition Feedback**
   
   Receive focused, 360-degree transition feedback to guide your progress.
Forming Connections

10. □ Understand Team Objectives and Concerns
Discuss objectives and concerns with your direct reports.

11. □ Meet Business Partners’ Expectations
Know how well your function is achieving your business partners’ most important priorities.

12. □ Engage Critical Stakeholders
Identify critical internal and external stakeholders, and know how to engage them.

Shaping the Future

13. □ Achieve Quick Wins
Identify early wins that enlist the full participation of your new team.

14. □ (Re)define Strategic Priorities
Define a long-term strategic plan for your function that aligns with your corporate vision.

15. □ Manage Change Initiatives
Plan to communicate your change initiatives, get buy-in, and minimize associated conflict.

16. □ Drive Functional Performance
Define metrics to track and drive functional performance.
## Common Pitfalls and Keys to Success

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<th>Pitfalls</th>
<th>Keys to Success</th>
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<td><strong>Organizations and Leaders</strong>&lt;br&gt;<strong>Underappreciate Transition Content</strong>&lt;br&gt;Conventional views of leadership transitions fail to account for differences in the circumstances each transitioning leader must face.</td>
<td><strong>View Transitions Through a Situational Lens</strong>&lt;br&gt;This approach reveals five transition situations that account for more than 97% of all leadership transitions: smooth sailing, replacing an icon, following a train wreck, jump start, or breaking ground.</td>
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<td><strong>Leaders Often Have an Underprepared Support Community</strong>&lt;br&gt;The community of stakeholders the leader will be working with is often not included in the transition plan. Less than one-third of the people supporting senior leadership transitions are effective at doing so.</td>
<td><strong>Shift Transition Community from Passive Observers to Active Transition Partners</strong>&lt;br&gt;Educate community members on transition-related roles and how to play them effectively. Then, equip each community member with the resources and tools to interact with and support the new leader during the transition.</td>
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<td><strong>Companies Treat Transitions as Events Rather Than as Repeatable Processes</strong>&lt;br&gt;Most organizations approach new leadership transitions the same way they approach mergers and acquisitions; as one-off events.</td>
<td><strong>Orchestrate a Structured Transition Support Process</strong>&lt;br&gt;Mobilize resources and apply innovative tools and approaches to assist the leader with a set of high-impact transition activities.</td>
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<td><strong>Leaders Receive Limited Support Beyond the “First 100 Days”</strong>&lt;br&gt;While the first 100 days are a critical adjustment period, new senior leaders often hit a “stall point” at the six- to nine-month mark.</td>
<td><strong>Provide Transition Support Well Beyond the “First 100 Days”</strong>&lt;br&gt;Accelerate leader performance through pre-transition coordination between previous leaders and new managers, ongoing feedback from direct reports and peers, and transition tools and leadership coaching from HR.</td>
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Contact Us

+1-866-913-2632
LTS@cebglobal.com
cebglobal.com/leadership-transition