



*Career Transition Series*

# **A Brief Guide to Executive Onboarding**



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*Finding Exceptional Talent.  
Building Exceptional Organizations.*

# Contributors

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Anita Shuper is a writer, researcher, and business consultant. With a background in the arts, science, and business, including an MBA from the Rotman School of Management, she has written on topics ranging from language to lasers to local entrepreneurship. Anita regularly contributes her communications expertise to projects and programs in not-for-profit and startup organizations. Her current focus is developing career management resources for students and executives.

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## **Point of View**

Executive onboarding refers to a formal or informal program or organized effort to help new leaders transition into their roles. It is not simply an orientation. While orientation elements are more administrative in detail and valuable for any new employee, onboarding is more strategic and becomes increasingly essential for leadership positions.

Onboarding is often talked about but needs to be better executed. Some companies have well-developed programs and good intentions, but what needs to be improved is the execution. Effective onboarding requires commitment from the new executive as well as critical stakeholders. Since day-to-day business affairs often take precedence, this process is usually overlooked or not a priority. It's up to you to make sure it happens.

There's a common belief that onboarding enhances a smoother transition, accelerates performance, and improves retention. That's often the positioning of these types of programs. However, the company is rarely able to facilitate this, so the executive needs to take control of their onboarding. There are several supporting resources you could turn to for this, including books, coaches, and self-guided programs. It would help if you took responsibility for this. You have to engage with the new employer, find some alignment with key stakeholders, and understand what's vital for you to accomplish.

It doesn't matter to what extent the organization does or does not provide you with onboarding resources. It's your job to ensure you know what is expected of you in the first 100 days and to align your objectives accordingly. Don't wait for a performance gap to figure that out. Schedule regular reviews in advance to keep you on track. If the company does provide you with an onboarding framework, follow it – but add your components for accelerated learning and negotiate any material changes as necessary.

Bill Holland

# W5H

### Why?

Statistics indicate that many new executives need to be more successful. This results in a lost investment of time and money in the hiring process. It also sends a strong message to the organization that it needs better leadership.

### What?

The top three things you need to do are (1) have the right attitude, (2) make a plan and (3) take action. A good attitude will put you in the right frame of mind, a plan will keep you on track, and executing that plan is the key to success.

### Who?

Formal programs typically involve critical organizational stakeholders, including the executive, the manager, and HR. While there is shared responsibility for the process and outcome, the executive is ultimately the “owner” of their onboarding, and the onus is on them to make it successful. You may choose to have a coach or mentor help you.

### When?

An ideal executive onboarding program begins well before the individual’s first day on the job, and the fundamental elements continue throughout their tenure. Formal programs are often 90 or 100 days in duration.

### Where?

Onboarding will involve connecting with key stakeholders in and outside of the organization. From your direct manager (if you have one) to your employees, customers, investors, and others, you will take a broad approach to learning what you need to know to succeed. Management consulting companies also design, develop, and implement onboarding programs. Books, such as *The New Leader’s 100-Day Action Plan* (Bradt, Check, and Lawler), are also excellent resources and particularly useful for motivated executives who recognize their ultimate responsibility for the onboarding process.

### How?

It’s all about execution. With a plan in place, the “how” is a commitment to doing it. In this guide, we’ve set out the following goals for you to start working on (1) determining what’s expected of you, (2) getting to know key stakeholders, and (3) measuring your performance. If you focus on these at a very minimum, you will be off to a good start. It’s up to you to supplement the activities we suggest with others that make sense for you. There’s no shortage of resources in bookstores and online to keep moving you forward.

## **Attitude**

Being in the right mindset about onboarding will set you up for success. You don't want to be one of the executives who fail within the first 18 months. A well-executed program has the potential to accelerate your performance, so commit yourself to undertaking one.

With a good attitude, you'll be more open to the input of others and committed to action. Onboarding is an opportunity to get you started doing the right things. If the company has a program in place, follow it, don't dismiss it. If you are creating your onboarding program, keep it simple—don't make it a full-time job. Don't overburden yourself and the company with too much detail. It's meant to steer and get you on track, not dictate your every move. Formalize a plan for yourself, but don't make it too complicated.

Remember that you're still accountable to others even if you're the CEO. Your boss is the board, shareholders, management team, investors, customers, and other stakeholders. Not only are you accountable to them, but as a professional, you should also be accountable to yourself.

## **Plan: Creating SMART Goals**

With the right attitude, the next step is to make a plan. Having a roadmap to keep you focused and on track is essential. Without a plan, you'll engage in aimless activities and wonder why you're not reaching your ultimate goal of finding a job.

A complicated plan will just prevent you from getting things done, so keep it simple. Overplanning invariably leads to underdoing. However, to be efficient and effective, you must spend some time upfront identifying your goals and creating a workable action plan.

An excellent way to approach your goals is to make them SMART (specific, measurable, attainable, relevant, and time-driven.) On the following pages, we review a number of goals and provide some advice to help you:

1. Determine what's expected of you
2. Get to know key stakeholders
3. Measure your performance

## **Execution**

### **1. Determine what's expected of you**

You have been hired to do a specific job and achieve specific results. It's up to you to understand what success looks like. What does this mean in the short term (100 days), medium term (1 year), and beyond? As you determine these, ensure the short and longer-term objectives are aligned.

Start by looking at your position description, which likely outlines critical deliverables. Read the strategic and business plans to determine when you enter the organization. This will shed some light on what you're expected to achieve.

It's also critical to communicate with key stakeholders and the team you lead to get their perspective and input on what's expected. Find out to whom you're accountable for each deliverable. Furthermore, find out what resources are available to get the job done.

### **2. Get to know key stakeholders**

Make it a priority to interact with people daily, including your team, superiors, and other stakeholders. These people will impact and influence your success and vice versa. Whether they have or don't have authority, the people you deal with daily will somehow affect what you do and achieve.

Take the time to understand the objectives and motivations of key stakeholders. Find out what makes them tick and understand their personalities, work styles, skills, and trustworthiness. You can get to know people through formal and informal meetings. Don't wait for them to come to you—step up and introduce yourself first.

Think beyond your immediate stakeholder group. This includes the board, executive managers, and other divisions. It's good to know their expectations. Meet stakeholders in informal settings, like over coffee or lunch. There's a better chance they'll open up in an informal rather than a formal meeting. Make an effort to get to know the person behind the title.

### 3. Measure your performance

When you create your onboarding plan, set objectives so you can measure your performance against them. Validate the plan with your boss, HR, and other key stakeholders. Then, you set out to do the job. Have some informal review checkpoints in place monthly and even weekly. Formal reviews should also be built and continued past your first few months. These checkpoints will allow you to get feedback and determine whether you're on track or need to recalibrate.

A 100-day plan is designed to help set the foundation for success beyond that. Anonymous feedback, if possible, is also valuable. It tends to be more candid and helpful. Though not often done, consider 360-degree feedback—it can be powerful. At a minimum, get constructive feedback from key stakeholders. Ask them: “This is what I set out to do, what I've done, and what I must do. What do you think?” Solicit positive, constructive feedback on what you've done and plan to do. Measure this against your plan. It's essential to do this—and most people don't.

You're not measuring corporate results or corporate performance here. You're measuring how well you're onboarding. Are you doing the right things now to set yourself up for success later on? The corporate measurements are secondary and will come later. Right now, your job is to understand. You're not measuring yourself on KPIs for the company. Instead, this is a learning and diagnostic stage. Acknowledge your progress in this first stage of your new career. After all, you may not get this kind of acknowledgment from others.

## Top 10 Mistakes

1. **You are not doing it.** Perhaps you're not involved in a formal onboarding program because you and your organization don't recognize its value. However, given the high executive failure rate, ensuring you succeed is in everyone's best interest. An effective onboarding program that fosters success is an essential element that will get you up to speed, keep you on track, and get you doing what you were hired to do: leading the organization.
2. **You are starting from scratch.** Even if your organization has no formal program, you don't have to reinvent the onboarding wheel when transitioning into your new role. Many resources are available to individuals and organizations to guide them through the onboarding process. Do a simple online search to learn what programs and tools are available and appropriate for you.
3. **You are doing it alone.** While you might need more formal support from your organization during onboarding, you still need input from various stakeholders. You can't learn everything independently, so identify which key people you need to align yourself with. This includes your manager, human resources, leadership team, and key stakeholders outside of the organization. Obtaining support from an executive coach is recommended.
4. **You are not setting objectives.** Without developing a strategy, determining priorities, and setting objectives, you have nowhere to aim your efforts. Appropriate targets and a specific action plan to reach your goals are crucial to success.
5. **You are not clarifying expectations.** When you were hired for the job, the organization must have had something in mind for what it wants you to accomplish. Do you know what it is? Can you articulate it? Can they? Talk to the people who hired you to discuss expectations and ensure you understand your mandate.
6. **You are not immersing yourself.** As a leader, it's your job to learn as much as possible about your business. While you shouldn't abandon your family or other personal responsibilities, understand that you're not in a 9-5 job. Immersing yourself in the organization's culture by showing up early, staying late, and carving out relationships is especially important as you transition into your new role.
7. **Doing too much too soon.** Immersion doesn't mean burnout. It's great to be eager and motivated, but pace yourself—unrealistic expectations about what you can accomplish and when will leave you frustrated and disappointed. Expect the learning curve to be steeper at the beginning as you acclimate to your new environment and responsibilities.
8. **You are not seeking feedback.** You may think you're doing a great job, but what do others think? Are you getting it? Are you on track? Getting feedback from others is critical to staying focused on the right things. If people aren't offering it, ask for candid and constructive feedback from others.
9. **You are not measuring progress.** Making a plan is excellent if you take action and track your progress. If you've set goals and put some stakes in the ground, take the time to assess what you've accomplished before moving ahead. You may need to adjust your plan depending on how things are going.
10. **Stopping.** Have you finished a 90 or 100-day onboarding program? Feeling good about what you've accomplished? Congratulations! But it doesn't end here. Continuing to learn, set objectives, seek feedback, and measure results is part of your organizational leader role. Celebrate your successes, but keep the momentum going as you enter the next phase of your tenure.



## **Titles in the Career Transition Series**

### **A Brief Guide to Executive Branding**

As an executive, it's essential to establish and develop your brand. Nobody else will do it for you! In this guide, we'll introduce you to the "5 Cs" of executive branding: clarity, consistency, constancy, credibility, and confidence.

### **A Brief Guide to Job Search Networking**

Networking is an integral part of your job search strategy. It's also easier than most people think! In this guide, we'll get you started on some essential networking activities, including building your base network, preparing your pitches, getting set up on LinkedIn, and having face-to-face meetings.

### **A Brief Guide to Writing Your Resume**

Resumes open doors. They can also close them. To be considered for the opportunities you want, it's up to you to make a great first impression with your resume. In this guide, we'll get you started on writing your chronological resume, online resume, and one-page biography.

### **A Brief Guide to Interviewing**

While resumes open doors, interviews get offers. You must demonstrate that your skills, attitude, and personality make you the right person for the job. In this guide, we'll get you started on preparing for a winning interview.

### **A Brief Guide to Job Offer Negotiation**

Negotiating is both an art and a science. People who are uncomfortable about negotiating need more confidence because they need experience. In this guide, we'll start you on how to best prepare and practice for a win-win job offer negotiation.

### **A Brief Guide to Executive Onboarding**

Getting the job is excellent, but succeeding in it is what matters. Whether or not your new organization has a formal onboarding program, consider yourself in charge of the process. In this guide, we'll get you started on several critical onboarding activities to set you up for success.

Start Mandrake's FREE! Career Transition Program by [clicking here](#).