

# Harvard Business Review



## PROFESSIONAL TRANSITIONS

# Onboarding Isn't Enough

by Mark Byford, Michael D. Watkins, and Lena Triantogiannis

FROM THE MAY-JUNE 2017 ISSUE

**A**n executive we'll call Lucas Jacobsen was ready for a new challenge. So after more than a decade at a *Fortune* 100 diversified manufacturing firm, where he had risen to lead product development in the power systems division, he decided to move on. He accepted an offer to head up R&D at Energix, a rapidly growing manufacturer of power system instruments. But his previous experience had not prepared him to operate in this much smaller business with its consensus-driven culture. Furthermore, Energix provided virtually no onboarding and integration support. After HR

and IT set him up in their systems and his boss introduced him to the team and gave a brief overview of the role, Jacobsen was expected to figure out how things “really worked” on his own. That was a struggle. His hard-driving style—combined with some misconceptions that others had about his mandate—led to difficulties with his new peers and ultimately to his departure.

Many businesses think they are doing a good job of bringing newly hired executives like Jacobsen into the fold when they actually aren't. Nearly all large companies are competent at the administrative basics of signing leaders up, but that level of onboarding does little to prevent the problems that can arise when these people start working with new colleagues and grappling with unfamiliar cultural norms and expectations. Companies vary widely when it comes to how much effort they put into integration, with major consequences in terms of time to performance, derailment (through termination or resignation), and talent retention.

“Onboarding” involves not much more than bringing the executive safely on deck.

To help companies understand what executives must do to become effective in their new roles and how to help them accomplish that more quickly, we developed an assessment framework. In this model the “what” is a set of core transition tasks for new hires. The “how” is broken down into distinct levels of support that companies can provide. But before we get into those details, let's take a closer look at where most organizations fall short in their onboarding efforts and the benefits they can gain by changing their practices.

## **From Onboarding to Integration**

“Onboarding” is an apt term for the way many companies support new leaders’ transitions, because not much more is involved than bringing the executive safely on deck. After that, he or she is expected to know what to do or to sort things out with little or no guidance. For this reason we no longer use the word “onboarding” to describe the work we do with companies seeking to support their new hires; we use “integration” instead.

“Integration” suggests a more aspirational goal—doing what it takes to make the new person a fully functioning member of the team as quickly and smoothly as possible. That’s not common practice, unfortunately, as we saw in Egon Zehnder’s online survey of 588 executives at the VP level and above who had joined new companies in the past few years. The participants represented both publicly traded and privately owned companies across Europe, North America, Latin America, and Asia. One-third of them were in the C-suite. Almost 60% reported that it took them six months—and close to 20% said it took more than nine months—to have a full impact in their new roles. Less than a third said they had received any meaningful support during their transitions—a big problem when you consider that more than 80% of this fortunate minority thought such support had made a major difference in their early impact.

## **The Biggest Stumbling Blocks for New Leaders**

According to a global survey of 588 senior executives who had recently transitioned into new roles, organizational culture and politics, not lack of competence or managerial skill, were the primary reasons for failure. Almost 70% of respondents pointed to a lack of understanding about norms and practices—and poor

Well-integrated executives can build momentum early on rather than struggle up learning curves. Our studies show that the average amount of time to reach full performance (making critical decisions with the right information in hand and having the right people in place to help execute) can be reduced by a third, from six months to four.

cultural fit was close behind. When asked what would reduce failure rates, they emphasized constructive feedback and help with navigating internal networks and gaining insight into organizational and team dynamics.

Poor grasp of how the organization works

69%

Misfit with organizational culture

65

Difficulty forging alliances with peers

57

Lack of understanding of business model

48

Ineffective decision making

31

Disagreement over strategy

28

Lack of experience or skill

26

## Where Companies Provide Support—And Where They Don't

In a global survey, 198 HR executives assessed their organizations' onboarding efforts. Most thought their companies did a good job with basic orientation and the legal and procedural formalities of signing up

A sink-or-swim approach leaves too much to chance. In strategically vital executive roles throughout a company, sluggish transitions are expensive. And financial costs aside, the new executive's "brand" and followership take a significant hit. (For insights on the challenges of CEO succession in particular, see "After the Handshake," by Dan Ciampa, HBR, December 2016.)

Most organizations—even those that set the bar pretty low—believe they are integrating executives effectively. When we asked HR leaders at global companies if they had an onboarding system, the answer was inevitably yes. However, when we asked what they did to accelerate the integration of executives into their roles, we found that actual support varied dramatically, from extensive to essentially none. It doesn't help that the term "onboarding" is not well defined or understood. In many companies it refers mainly to completing the required documents, allocating space and resources, and providing mandatory training, usually in technical areas such as compliance. These things involve little or no time investment from senior management and do nothing to

new hires. But only about half said their organizations were effective at facilitating alignment between leaders and their teams, and fewer than a third said they actively helped executives adapt to the cultural and political climate.



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help leaders clear the biggest hurdles they will face in their new roles: cultural and political challenges.

Consider, in contrast, those companies that devote substantial resources to helping new executives become fully integrated. For example, at a major global communications and digital services company that develops general managers through frequent country rotations, all new subsidiary leaders are strongly encouraged to go through a structured integration program. Almost everyone accepts this support, and that's telling: Leaders feel more comfortable receiving help in an organization that emphasizes learning at all levels. Sometimes the program is preceded by an appraisal of the critical "soft" skills that most executives say are the hardest to master at first. One tool used is a culture questionnaire, which compares work practices in the executive's

previous company (or unit or country) with those in the new setting, flagging potential problems.

Here's an issue that often emerges: Many of the communications company's subsidiaries have an entrepreneurial culture, but recruits often come from large, heavily matrixed competitors. What their previous colleagues might have seen as thoughtful consultation

with key stakeholders may be perceived in the new setting as slow decision making or a lack of conviction and initiative. Of course, differences in regional culture, too, are significant for executives transferring to other countries. Systematically examining such differences and their possible impact has greatly reduced derailment risks and decreased the amount of time it takes leaders to become effective in their new environments.

Stakeholders are listed and discussed—who should be prioritized for early meetings, how certain individuals should be approached, and so on. Executives are encouraged to prepare an elevator speech before starting in their new roles, summing up why they are joining and what they hope to contribute to the company. New leaders say that this exercise gives them a powerful way to crystallize their key messages, which they can begin sharing the moment they walk through the door; the company has found that this enables them to communicate their intentions more clearly to their teams and peers in their first weeks on the job.

Focused integration efforts in this organization have helped executives avoid common pitfalls and accomplish more early on, and the individual gains have created a significant collective benefit. Having fewer transition failures has increased employees' confidence in the company's ability to plan succession moves, making it easier to persuade internal candidates to agree to them. As a result, the ambitious rotational program described above (essential to the company's growth plans) has been successful—and new leaders have acclimated to their roles much faster.

The communications company has also discovered that its integration work with general management candidates has increased employees' awareness of transition risks. It's now doing more to address the needs of new managers below the top two tiers—using less-expensive, more-standardized tools to invest in their development. Integration support is thus becoming part of the company's culture.

## The Five Tasks

In our research and decades of experience working with executives, we have identified five major tasks that leaders must undertake in their first few critical months. These are the areas in which they need the greatest integration support:

### 1. Assuming operational leadership.

Even with the best possible exchange of information during the recruiting process, any leader in a new role (especially an outsider) will have an incomplete picture of the business—its strengths, weaknesses, opportunities, and threats. A new leader builds his or her credibility by demonstrating awareness of important operational issues, swiftly solving urgent problems, and identifying and achieving quick wins. Good early decisions on the ground have a material impact on his or her reputation as an effective leader.

New leaders have to signal that building relationships is a priority for them.

### 2. Taking charge of the team.

New leaders naturally focus on their direct reports at the outset—they know they must quickly confirm or adjust the team's composition and goals. It is often easier to decide toward the beginning whether or not to retain people, because the team's makeup is not then seen as the new leader's choice. However, this window closes soon, and focus and discipline are needed to efficiently gather information for smart decisions. It's valuable to allow a new leader to take a fresh look at the talent without coloring his or her view in advance; but it's equally valuable to share insights about individual team members' performance and development. Striking the right balance requires careful planning and coordination with HR and, typically, one or more facilitated sessions between the executive and the team during the first few weeks. The goal is to create a safe environment for both to give timely, constructive feedback and to ask what may seem like awkward questions when

relationships are just beginning to form. In this way any misperceptions about the leader's words, actions, or initial decisions can be identified and clarified before mistrust or doubt about his or her values or capabilities takes hold. Building trust early with the team enables the new leader to make key decisions with confidence that people will follow through on them.

### **3. Aligning with stakeholders.**

New leaders also need to gain the support of people over whom they have no direct authority, including their bosses, their peers, and other colleagues. Because they arrive with little or no relationship capital, they have to invest energy in building connections—and clearly signal that they know it's a priority. After identifying the most important stakeholders outside their teams, they must take time to understand their colleagues' expectations and develop a plan for how and when to connect with people. That means learning how decision making works in the organization, who has influence over it, and where the centers of power reside.

### **4. Engaging with the culture.**

It's also critical to get up to speed on the values, norms, and guiding assumptions that define acceptable behavior in the new organization. Missing cues early on can negatively affect how others perceive a new leader's intentions and capabilities. The executive must also walk a fine line between working within the culture and seeking to change it.

### **5. Defining strategic intent.**

Finally, the new leader must start to shape strategy. Sometimes executives are hired for their expertise in a particular approach; other times they are chosen for their ability to develop and implement an entirely new strategy. If a new strategy is required,

corresponding elements of the organization—its structure and its talent management and performance measurement processes—must be transformed to execute it. Either way, the new leader must be clear about the path ahead.

Together these five transition tasks present a daunting challenge. Stumbles in any area can lead to serious problems or even outright derailment. Effective integration is much more likely when leaders understand—*before they start* in their new roles—how much progress they'll need to demonstrate in each area during the first few months. That way they can prioritize their time effectively.

## The Spectrum of Support

Given how critical the five tasks are to a new leader's success, you will want to assess your company's integration program by looking at how effectively you support executives in each area. Support comes in four levels:

### **Sink or swim.**

Companies at this level—we call it level 0—do little more than provide a new executive with space and basic resources such as technology and assistants. Our research shows that about 5% of global companies offer such minimal support.

### **Basic orientation.**

This is level 1 in our model. It involves sharing information about company policies, team member evaluations, organizational structure, strategy, and business results. Essentially, the company provides raw data, and the new leader studies and interprets it independently. If the executive is given anything more qualitative, there is no support to ensure that its significance is well understood. Our research shows that about two-thirds of all global companies still take this approach.

### **Active assimilation.**

Here, at level 2, the company organizes meetings with key stakeholders to accelerate a transfer of deeper knowledge about the business, the team, the culture, and strategic priorities. At most, our research suggests, 25% of global companies have invested in this level of support. Although it goes beyond the bare minimum, without a shared understanding of major differences between an executive's former context and the new one, it can be difficult to know how much meeting time will be needed. And without prior briefing, the executive may neglect organizationally sensitive issues that he or she should address.

### **Accelerated integration.**

At level 3—the ideal—the company orchestrates custom-designed experiences that enable a new leader to integrate more fully and rapidly. These might include team-building workshops and deep-dive discussions about strategy. The organization helps the new executive identify specific cultural challenges to be overcome, as the global communications company does with its questionnaire about previous ways of working. Despite the clear value to be gained, our research suggests that no more than 2% of global companies address integration this systematically.

We find that in practice, support tends to vary from one transition task to another. For example, a company might organize meetings (level 2) to help a new executive assume operational leadership and align with stakeholders, but provide only basic information to support taking charge of the team (level 1) and do virtually nothing (level 0) to help the executive engage with the culture or define strategic intent. A thorough assessment reveals strengths and weaknesses across the five major tasks.

## **Assessing Your Company's Onboarding Effectiveness**

This tool will help you evaluate your organization on its commitment to *basic orientation* (signing up new hires and explaining roles and organizational structure), *active assimilation* (making modest efforts to help people understand organizational culture and politics), and *accelerated integration* (investing resources in bringing people up to speed quickly).

### Here's How It Works:

1. In each column, mark or make note of the elements that are part of your onboarding process.
2. Add up the marks in each column to see your company's scores for basic orientation, active assimilation, and accelerated integration. Compare your scores with the averages among the companies we studied.
3. Now add up the marks in each row to determine your company's score for supporting each of the five major tasks, and compare those totals with the averages from our research.
4. Combine the row totals to calculate your company's total score. (Because you are adding values in a matrix, the sum of the rows will be the same as the sum of the columns.)
5. If you have few or no marks across the board, your organization is taking a *sink-or-swim* approach to onboarding.

	<b>BASIC ORIENTATION</b>	<b>ACTIVE ASSIMILATION</b>	<b>ACCELERATED INTEGRATION</b>	<b>Average score</b>
<b>Assuming operational leadership</b>	<ul style="list-style-type: none"> <li>Operational plans</li> </ul>	<ul style="list-style-type: none"> <li>Structured introduction to key business areas</li> <li>Introductory visit to key company locations</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity to sit in on critical business meeting before day one</li> <li>Immersive experiences in unfamiliar areas of the business</li> </ul>	3.0 out of 5
<b>Taking charge of the team</b>	<ul style="list-style-type: none"> <li>Career histories for key team members</li> </ul>	<ul style="list-style-type: none"> <li>Performance and/or assessment data on team members</li> <li>Briefings to provide confidential insight on team members</li> </ul>	<ul style="list-style-type: none"> <li>Briefings on team dynamics and history</li> <li>Facilitated workshop with the team (e.g., new leader assimilation)</li> </ul>	3.2 out of 5
<b>Aligning with stakeholders</b>	<ul style="list-style-type: none"> <li>Relevant organizational charts</li> </ul>	<ul style="list-style-type: none"> <li>List of key internal stakeholders</li> <li>Introductory meetings with internal stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>List of key external stakeholders</li> <li>Briefings on stakeholders (e.g., their agendas)</li> </ul>	2.8 out of 5
<b>Engaging with the culture</b>	<ul style="list-style-type: none"> <li>Statement of company philosophy and values</li> </ul>	<ul style="list-style-type: none"> <li>Briefing on culture and ways of “getting things done”</li> <li>Structured events to attend in order to understand culture</li> </ul>	<ul style="list-style-type: none"> <li>A “cultural interpreter” to provide insight</li> <li>Assessment to highlight differences between current and former cultures</li> </ul>	2.6 out of 5
<b>Defining strategic intent</b>	<ul style="list-style-type: none"> <li>Business plans</li> </ul>	<ul style="list-style-type: none"> <li>Strategic plans for the business (e.g., vision and long-term priorities)</li> <li>Conversations with key stakeholders on strategic challenges</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity to participate in an off-site strategic meeting</li> <li>Dedicated workshop on strategy and existing plans</li> </ul>	2.6 out of 5
<b>Average score</b>	4.2 out of 5	6.5 out of 10	3.5 out of 10	Total: 14.2 out of 25

## What Progress Looks Like

FROM “ONBOARDING ISN'T ENOUGH” BY MARK BYFORD, MICHAEL D. WATKINS, AND LENA TRIANTOGIANNIS, MAY-JUNE 2017

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When companies start integrating their executives more effectively, it's often because they've been compelled to do so by a combination of external and internal factors. Consider this example:

Over the past seven years a consumer goods company that operates across Europe, Asia, and Africa has deliberately intensified its integration efforts, in the process moving from level 1 to level 2 or 3 in most areas. For many years before the 2008 financial downturn, senior management had defined and nurtured a culture that prioritized internal talent development. The company used cross-functional work to strengthen people's capabilities so that leaders could be promoted from within. Consequently, most executives who became general managers had built their careers at the company. Given the diversity of the markets in which they were operating (both developed and developing economies) and the organization's consensus-driven approach to decision making, HR and line managers had seen a need for basic orientation. The baseline had been to acclimate newly appointed executives by sharing information about the local businesses and identifying key stakeholders—including team members—so that leaders could schedule meetings in the early days (level 1).

But after the 2008 crisis hit, senior management embraced a new operating model that entailed a much more matrixed organization. Recognizing the need for new capabilities to run it effectively, the company redesigned its talent programs. At the same time, the CEO and the executive team decided they had to quickly make a number of strategic external hires to bring in general managers with the requisite skills.

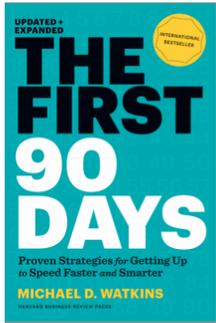
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#### FURTHER READING

### **The First 90 Days, Updated and Expanded**

**LEADERSHIP AND MANAGING PEOPLE BOOK** by Harvard Business Review

It soon became clear how difficult it was for outsiders to instantly grasp when they were empowered to make decisions locally and when it was important to reach consensus



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with the head office. So the company began to provide coaching on decision making and stakeholder management and asked line managers to play an active role in this effort. When the CEO hired a direct report from outside the company (which was still a relatively rare occurrence), he invested

significantly in that executive's integration support and challenged others on the senior team to raise their game in this area. He worked closely with the new leader and a third party to identify potential problems and address them openly.

## Custom-designed experiences will enable a leader to assimilate more rapidly.

That was certainly a critical milestone: Support for certain transition tasks reached level 2 as a result of the push from the top. More new leaders were encouraged to run team workshops early on and were briefed on stakeholders' priorities and constraints in the matrixed organization. But efforts still varied quite a bit throughout the company, and results were mixed. Some new external hires were extremely successful, but others were not—even though they'd made effective moves elsewhere.

In response to that wake-up call, HR and senior management examined the difficulties that new hires faced—particularly the new-market challenges—and decided to adopt much more broadly the best practices that the CEO had established. They offered thorough integration support to new general managers, including those transferring internally from one market to another. They also reviewed successful individual cases—in which 360-degree feedback indicated that the executive had reached full effectiveness in half the usual time—to see how

integration risks and challenges had been mitigated. The systematic support was an investment, but the payback was pretty much immediate. So the company strengthened its internal programs even more, bringing in expert coaches from the outside.

Together these programs address all five transition tasks at the company. The intensity of support is adjusted in each area to level 2 or 3, depending on the needs of the executive in question. Each new leader is assisted in developing an individual learning plan and hosting a team workshop in the first four to eight weeks and is furnished with confidential insights about specific stakeholders and potentially challenging aspects of the corporate culture.

Today integration support is standard practice in the organization. With HR's help, the executive committee determines which level of support should be brought to each case. Every other month the committee reviews an average of 30 cases, examining reports on leaders' progress (based on input from coaches and other observers) and identifying actions to take.

These efforts have been embraced internally; both new and aspiring leaders can clearly see their value, and so can the people who work with and rely on the executives. And stakeholders understand the roles they must play in new leaders' transitions. Despite continuing pressure on budgets, senior management sees integration support as a necessary investment in talent development that yields tangible results, both for the business and for individual executives.

Though the benefits of integration support are clear at this company and others we've studied, such success stories are all too rare. Perhaps that's because organizations focus so much on securing the right leaders for key roles that they overlook the need to help them

with their transitions—or don't set aside the necessary resources. But by treating integration as fundamental to their talent strategy, they can harness leaders' potential more rapidly and reap the rewards that much sooner.

A version of this article appeared in the May–June 2017 issue (pp.78–86) of *Harvard Business Review*.

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**SriRama Evani** 5 months ago

This is really useful and liked the idea of "integration" and "engagement"! I think, culture place a big role here and commitment by the management to make it happen is a must. After a long and expensive search to find an executive, the internal dynamics, culture and commitment from Management should support and help the on boarding process to make it a seamless journey!

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