**LEADERSHIP TRANSITION WORKSHEET**

*Can be used to plan your own successful transition into a new role or to create a new leader support plan.*

**Key Topics for the Plan:**

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| **THE NEW LEADER** | **THE BOSS/BOARD** | **THE PEERS/COLLEAGUES**  |
| Job Fit Management:* *Strengths to leverage early.*
* *“Watch-outs” and weaknesses to manage*.
 | Role in start-up:* *Clear performance expectations*
* *Coaching role on the “how” as well as “what” (especially culture)*
* *Regular check in and coaching routine set*

Ownership of ‘start-up’ plan:* *Set up mentor(s)*

Six month Check-in Date: | * I*dentify key peers and colleagues*
* *Key expectations and support connections*
* *Communication and relationship building*
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| **THE WORK TEAM** | **THE WORK** | **OTHER STAKEHOLDERS** |
| * *New manager assimilation meeting*
* *My Leadership Story/Operating Guide*
* *Team development plan*
 | * *Early challenges and work products to deliver*
* *“Need to know” information*
* *Job preview guide*
 | * *Identification of important “others” (internal/external)*
* *Early encounters*
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**Transition Plan:**

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| **Transition Topic and Action:** | **Responsibility and Resources:** | **Date:** |
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