**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* |
| **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* |

**Transition Plan:**

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