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Transition Meetings: Pathway to Productivity

By Gilmore Crosby

The Transition Meeting, also known as a New Reporting Relationship meeting (NRR), is a simple and effective method for managing leadership transitions. NRRs were developed by the U.S. Navy and have been practiced for decades by the author and his associates.

The Navy conducted research on the impact of transitions. They found that the disruption follwing a transition (including a consistent decrease in effectiveness and productivity) were reliably reduced from six months to one month when transition meetings were held .

The essence of an New Reporting Relationship transition meeting is a facilitated conversation between the subordinates and new leader. The key elements are as follows:

- **Do it as soon as possible.** Although many leaders assume some time should pass before such a session, no period of familiarization is necessary prior to an NRR. The Navy conducted their NRRs as soon as the new officer came aboard.

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- **Provide skillful faciltation.** A neutral and skillful facilitator, by helping clear up misunderstandings as they happen, can be the difference in the team getting off on the right foot.

  Although a do it yourself NRR is not out of the question, a skilled facilitator adds value by orchestrating the process (so the participants can focus on the interactions) and by reinforcing active listening skills on the part of the leader and the subordinates. A leader who facilitates their own NRR is unlikely to objectively catch their own behavior if it is somehow building a wall between themselves and their new subordinates, and runs the risk that the participants will be more cautious/less candid.

- **Prepare carefully.** At minimum, the facilitator interviews the new leader prior to the session. Ideally, they interview the subordinates as well. The interviews allow the facilitator an opportunity to build rapport, discuss the process, clarify their own role, and stimulate the participants thinking.

  Topics range from the leader's intentions regarding decision making and leadership style to the subordinates' views on the organization's strengths and weaknesses.

- **Encourage direct interaction.** Even though a list is created by the group (see Step 2, below), it's vital that individuals *speak for themselves* during the meeting, when their item comes up on the list.

This may cause some initial anxiety for a few participants (and facilitators!). However, the outcome of many team members gaining the experience of testing the waters directly with the new boss (and visa versa) will be watered down if the facilitator or a spokesperson speaks for the them. It also get in the way if the boss reads off the questions and launches into a monologue without knowing whom they are responding to. Anonymity is counter-productive in an NRR.

People will warm to the task of being direct if it you don't let it get circumvented before you start. If a participant objects to being direct during the meeting, the facilitator can respectfully encourage them to find some timely way *outside the NRR* to raise it with the leader (while absolutely welcoming them to stay in the session!). Because you may have to spend some time on it, it's important to discuss this ground-rule in the preparation interviews, and again in the kickoff section.

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Transition Meeting, continued

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Here is a sample of a transition meeting agenda:

Step 1. Kickoff (30 – 45 minutes).

The session begins with introductions, any expectations the new leader may have (such as inviting people to be as open with them as possible), the facilitator's role, and a review of the agenda. It's also helpful if the new leader gives a brief overview of how they intend to manage, so the participants have more to chew on.

Step 2. Leader exits & group generates ask/tell list (approx. 1 hour).

The new leader then steps out of the room for approximately an hour, giving the participants a chance to think out loud and get organized. A cheat sheet of what individuals want to ask or tell the leader is recorded on a flipchart. The facilitator assists the participants in getting behaviorally specific. For example, if they want the new leader to "trust" them, or "show respect," the facilitator will ask them to clarify *what behaviors* would lead them to that judgment about the leader (the subordinates might, for instance, believe delegating certain decisions and tasks would be evidence of trust and respect).

(A short break is advisable prior to step 3.)

Step 3. Leader returns for dialogue and planning with the group. The leader returns and the participants take turns reading their own items off the cheat sheet, and discussing them with the boss. This takes two hours if briskly paced and skillfully facilitated.

During the dialogue the facilitator tracks commitments (who, what & by-when...tasks and *behaviors* agreed on by the leader and/or the subordinates), helps untangle miscommunication, and continues to reinforce "being direct." The process is complete with the exhaustion of the "ask/tell" list. For maximum effect, commitments are reviewed in a similar session 3 to 6 months down the road, and informally during the interim.

In sum, Transition Meetings, (with skillful facilitation), consistantly speed a work group's journey from forming to performing, and reinforce the behaviors needed to sustain productivity.

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See Gil's lists of possible questions for Transition Meetings on the next two pages.

Transition Meeting, continued

TRANSITION MEETING INTERVIEW QUESTIONS FOR LEADER

1. What is your primary decision-making style? *Authoritarian* (decide without input and tell), *Consultative* (get input and then make the decision or be 99% certain what you're going to decide but get input – with real possibility of being influenced - prior to making it official), *Group Orientated* (consensus – which, when done skillfully, means a reasonable degree of agreement on everyone's part within a predetermined timeframe - or majority rule via vote), or *Delegative* (decision-making authority is designated to other individuals or roles with clear parameters). When might you use each of these styles?
2. What are expectations about subordinates bringing problems to you?
3. Can they bring a problem without a solution? Is this seen as a weakness?
4. Do you want subordinates to bring problems: problem and analysis: problem, analysis and solutions: alternative solutions?
5. Comment on the following decision-making philosophy: Communication with any employee necessary to problem-solve, but action authorization by chain of command.
6. What is your position on your reports and their subordinates having information and problem-solving meetings?
7. When is a no a "No"?
8. When can a subordinate come back to you on a "No"?
9. What is your meeting style? How are your meetings run? Who runs them?
10. Discuss anger: What makes you angry? When your direct reports are angry at you, do you want to know? How do you intend to deal with anger and related emotions, both yours and others? What is your conflict style?
11. Do you hold grudges? About what?
12. What are your beliefs / practices about socializing with employees?
13. What does an employee need to do in order to obtain a high performance evaluation?
14. What are your expectations about starting work in the morning and quitting time?
15. A year from now, what are the behaviors, norms that you visualize being in place in the organization? How do you want to be known in three months time?
16. What is your open door policy? When can subordinates come to meet with you? When should they not come?
17. As a leader, what are your strengths and historical growing edges?
18. Where do you stand in holding yourself to deadline commitments and expecting deadline commitments of others?
19. If your people think that you are shooting the messenger, do you want them to tell you? If so, how?

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Transition Meeting, continued

TRANSITION MEETING INTERVIEW QUESTIONS FOR SUBORDINATES

1. What are the organization's key strengths? Weaknesses?
2. What do you want the new leader to conserve?
3. What is going on that gets in the way of doing your work?
4. What is the one aspect of your job that excites you the most? What disturbs you the most?
5. How do you function as a team? What is your role in the team?
6. What improvements would you make in the way things are managed?
7. What do you want the leader to know about you? What skills and knowledge do you bring to the organization? How would you introduce yourself if you were asked to do so by pointing out your major strength?
8. What do you want to know about the leader?
9. What changes do you need to foresee that the leader needs to consider?
10. What is your "contract" with the organization? What do you contribute? What do you expect to receive?
11. How are decisions made? Who is consulted before the decision? Who is informed after the fact?
12. Who can veto a decision?
13. Who must sign off on documents and in what order?
14. What type of behavior is necessary to be effective here?
15. What informal rules determine how things really get done?
16. Do you have sufficient power to accomplish your objectives? Whose influence or cooperation do you need and how can you get it?
17. Has leadership been clear and effective? What do you need more of or less of from the new leader?
18. Is it clear who is accountable for what?
19. Are time commitments made and kept?

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