

## New Job Leadership Checklist

By Ed O'Neil, Principal, O'Neil & Associates

A change of job, promotion, or even a new leadership role on a team produces a wide variety of leadership challenges. Most of us just jump in and get to work, drawing on the leadership skills that got us the new opportunity. For the most part this is fine, but there are some common missteps and missed opportunities that a new leadership post offers. This is a brief checklist to remind you of those.

### 1. Remember Your Leadership Profile

Take 10 minutes to make a list of your leadership attributes, both positive and those things that you have been working on changing. If you need some prompting, think about the last formal feedback you were given, end of year review, or concerns you discussed with a leadership coach. If you don't have any of these available, think of a colleague or peer that

you work with and trust who seems wise and is not going to be a new direct report. Ask her to give you the upside and downside of your leadership in your current role and what she thinks the challenges will be in your new role. You cannot have too much feedback in your leadership skills and development needs; the more data points the better. But remember, not all of those data points will be accurate.

### 2. Take Your Leadership to the Next Level

A lot of leaders fail in a new posting because they continue to do the same things that got them the job, not the things that are needed to be successful in the new position. It is natural to go to those things done well in the past, but they are not the ticket to success in the future. The question of what is needed to be successful in this new job is also a great question to ask your new boss.

There are three areas to pay attention to here:

- Ask yourself, "What do I need to give up in order to have time and focus for my new role?" Often these will be technical activities, and many times these are things that you enjoy doing. It may also be the time you were able to spend with skip level reports or frontline employees, but now there are just not enough hours in the day to do all of this, especially in a meaningful way for them or yourself. Consider group meetings over lunch or larger staff meetings for communication as a way of continuing to engage. Also, try to incorporate relationship maintenance in a "walking around" style that permits you to connect in a short two-minute exchange that is friendly and open, but not scheduled and demanding.
- Look at the list from your leadership profile and ask yourself, "What do I need to improve upon or develop to be successful here?" In general, these will be those things that move you to develop a bigger picture of your work and the work of your team or unit. It is a subtle shift from "What do I do to be successful?" to "How does my work and the work of this team fit into the overall success of the company or division?" It is important to know what your boss' boss is focused on so that you can understand your work in that context. You will also need to think in an enlarged way about your network and relationships. You will need to maintain good relationships, and some of these relationships will be new and need time and attention. But the real challenge will be for you to step more widely out from where you now sit to cultivate

### Leadership Tips

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relationships with a broader network of peers, as well as out and up with other leaders in the organization that are not in your direct reporting line.

- As you go up higher in any organization, each step is larger than the last, so there is a more dramatic shift in what you need to be able to do than occurred earlier in your career. One of the most evident of these is in the area of executive presence. This is not an invitation to give up on your “leadership style” which is probably what has led to your success in the past. But take five minutes and write down what you think is characteristic of your leadership and what you value. Then go back and take each of these attributes and values and push hard to see how they will work in your new environment. A classic one is around push and competitiveness. Often in a career, early recognition and success comes to individuals who distinguish themselves by hard charging leadership and action. But in your new executive role things such as team engagement, trade-offs, political savvy, and working toward the bigger goal may be far more important than “winning” a discussion in the leadership team meeting.

### 3. Consult With Your New Team

You probably have gained a new leadership team in your new position and it is most likely larger, more senior, and more sophisticated than the one you had before, if you even had a formal leadership team. Also, it is not uncommon that this new team includes one or two individuals who were peers and perhaps friends in the past and maybe even a few who believed they were destined for the chair you now sit in.

A good first step is to formally identify and recognize the team. Along the way it would also be terrific for you to share how you see the team’s role, what you need from them, and how you envision the interaction to look like. I also think that inviting them in to help define some of this is a sign that you are a strong leader who can work with a “team of rivals.”

Relationship building may be even higher on the agenda than defining the team. If there are rivals, do not avoid them. Go to them directly and ask them for their vision of issues and directions. Give them things to do. Paint a picture of collective success and their role in creating it. If the person is not a “rival” but was a peer who now reports to you, go to them with questions like, “How can this new relationship work best for you? What concerns might you have as we go forward? What advice would you give me as you know me so well?” Don’t make lots of promises, just collect information and let them know that you value them but, subtly, let them know that there has been a change. Just scheduling the meeting and asking them about these concerns will probably be enough to make the point.

Do not forget to walk around, be accessible, and show curiosity and interest in others and what they do. They do not want you to have all of the answers as you start, but they do want to know that you are engaged with them. For more on building your leadership team see [this past tip sheet](#).

### 4. Study Your New Leadership Team

You may be on a new leadership team, and that gives you a new leadership venue, but it also requires some careful and conscious action.

Push to get a clear picture of how your boss sees the role of the leadership team. Ask for clarification on any special contributions or role that she expects from you. There will also be an informal culture on the team that you may know about partially, but you will want to spend some time observing before you make any bold moves. You might be abjectly brilliant on your first day and from that point forward everyone defers to you with grace and support; or the same move may be interrupted as arrogant and ill-informed, and you could be ostracized for an extended period of time. It is quite alright to sit a bit and figure out the informal game here.

Along the way, get to know your new colleagues by scheduling time outside of the usual team meeting. Come with questions about their area, its relationship to your area, opportunities or concerns that they have, and what they found most challenging moving to the leadership level that you now share. You will learn a lot and they will feel a stronger connection with you.

Finally, make sure you spend some time developing your own ideas about the work of the leadership team. This is not your job, but it will prepare you for when the more important strategic questions are asked, and after a little seasoning you will be prepared to answer.

## 5. Get to Know Your New Boss

Well this may not seem like such a big issue, didn't they just hire you? But without attention this can go astray. Get a clear picture from the **boss** as to what success in your role looks like. What will make her happy? What are some of the benchmarks you should be hitting at six months and a year? And while you are at it: How does she like communication — form, frequency, content, and what are her pet peeves? Do not ask all questions at once, but know the answers to these questions by the end of month two.

Give her a chance to get to know you; but no later than two months after starting in your new role ask for some candid feedback as to things you should work on, or some things you may have missed on your to-do list that come to mind for her. She will likely say "you are doing great, just keep it up" but do not let her off so easy. Push back a bit and make sure you are really open to the feedback.

## 6. Problems Facing the Department

There are likely to be some issues facing the department or some things that you would just like to change. Particularly, if you were promoted up within the department from a more junior role. Move carefully. Do a few things that are not major, just indicate that there is a new sheriff, but nothing major. Look and listen, talk with others, develop relationship capital, and take time to integrate into your new role.

After you have a sense of a tactical and strategic agenda, share it with your boss and gain her input and support. Then share with your team, either one-on-one to gain their input, or collectively in a team meeting.

If there is a glaring problem or two that needs attention, address these right away, but make sure everyone sees the same urgency that you do.

## 7. Reflect on Your Communication Style

Finally, a new job is a great time to take a look at your communications content and style. You may have done this in the skill assessment, but if not ask yourself if the focus on your communications is pitched to the right level. A hint here: usually you will still be too much in the weeds for the new job.

Tone is important, too. In general, you need to be speaking in the plural first person. More "we" and very little "I", unless you are taking responsibility for something that happened. Think less definitive and more inclusive. This is also a good time to recall that as a leader the questions you ask are more important than the answers you give.

## About Ed O’Neil

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## About the Medicaid Leadership Institute

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