

THE ONBOARDING PLAYBOOK USED BY
SUCCESSFUL LEADERS WORLDWIDE

THE NEW LEADER'S



DAY ACTION PLAN

FOURTH EDITION

HOW TO TAKE CHARGE, BUILD OR MERGE
YOUR TEAM, AND GET IMMEDIATE RESULTS

GEORGE B. BRADT | JAYME A. CHECK | JOHN A. LAWLER

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We did not write this book as much as discover it. To a large degree, it is the product of all the transitions that have influenced all the people who have ever influenced us. Throughout our careers, we have learned by doing, by watching, and by interacting with a whole range of leaders—bosses, coaches, peers, subordinates, partners, and clients. We end every PrimeGenesis interaction with two questions: What was particularly valuable? How can we make it even more valuable? It is amazing what you can learn by asking.

What you have in your hands was born of continuing to ask those questions and the realization that onboarding is a crucible of leadership. Done poorly, it results in a lot of pain for a lot of people. Done well, the benefits are amazing, positively transforming leaders, organizations, and teams.

We would need a separate book to credit all the people who have had the most positive influence on us over the years. But we must acknowledge the contributions of our past and current partners at PrimeGenesis. Their fingerprints are all over this book as we all work these ideas every day.

In particular, we thank Jorge Pedraza, who was one of the founding partners of PrimeGenesis and one of the original coauthors of this book through its first, second, and third editions. Aside from being a brilliant thought leader and team leader, Jorge is easily the best author among us. So if you're reading a passage in this book that seems particularly well written, Jorge probably originally crafted it.

We are indebted to the clients of PrimeGenesis on several levels. We are the first to admit that we have learned more from them than they have from us. We give our clients complete confidentiality, so we have masked individuals' and companies' names in the stories involving any of our clients. We are blessed to have the opportunity to work with an extremely diverse group of clients. They run the gamut from the multinational to the small, from public company to private, from for-profit to not-for-profit. The executives we work with come from many industries, from almost every discipline imaginable, and from many

parts of the world. With every client, we have learned something new. Clients inspire, challenge, and teach us on a daily basis, and for that we are grateful. You can learn more about our list of clients on our website at www.PrimeGenesis.com.

We also thank the readers around the world whose enthusiastic embrace of the ideas in this book has kept us motivated to keep it current. We have the good fortune of truly engaged readers who download tools and interact with us on a daily basis from around the globe. We thank you for buying the book, passing it on, and reaching out to us to share your ideas, praise, constructive criticism, successes, and truly insightful questions.

Abounding gratitude to George's editor at *Forbes*, Fred Allen, and our editor at John Wiley & Sons, Richard Narramore. Each of them has nurtured our ideas and gently pushed us to make them better across the years.

And, finally, to our families and loved ones. We deeply appreciate your unending encouragement and support along the way.

Are you a veteran chief executive officer (CEO) taking the reins of your next organization? Starting a new role as a frontline supervisor? Something in between? Whether you are joining a new organization from the outside, getting promoted from within, leading a reorganization or restart, or merging teams following an acquisition, *The New Leader's 100-Day Action Plan* will help you take charge, build your team, set direction, and deliver better results faster than anyone thought possible.

We've found that 40 percent of executives hired at the senior level are pushed out, fail or quit within 18 months. It's expensive in terms of lost revenue. It's expensive in terms of the individual's hiring. It's damaging to morale.

—Kevin Kelly, CEO of executive search firm
Heidrick & Struggles, discussing the firm's
internal study of 20,000 searches.¹

What do these failed leaders not see, know, do, or deliver? In most cases, they dig their own holes by missing one or more crucial tasks in their first 100 days. Some don't understand the impact of their early words and actions and inadvertently send their new colleagues the wrong messages. Some focus on finding a new strategy, but fail to get buy-in and build trust with their new team. Some expend a lot of energy on the wrong projects without accomplishing the one or two things that their most important stakeholders expected them to deliver.

All are unaware of some of the important steps required to achieve a successful transition. No new leader wants to fail, but it happens at an alarming rate.

Meanwhile, if you're working at or owned by a private equity firm, the pressures can be even more intense. Gone are the days of delivering

¹ Quoted in Brooke Masters, 2009, "Rise of a Headhunter," *Financial Times*, March 30.

returns through debt and multiple arbitrage. Assets are fully priced, reflecting information transparency, surplus investment capital, and competitive buying environments. To deliver competitive returns, you must create meaningful value through organic improvements in operations and integration of accretive acquisitions over relatively short time frames. See Figure 0.1 below.

Whether you are operating in a major corporation, a smaller start-up, or a mid-sized business, delivering value is not getting any easier, particularly in complex situations where transformation and speed are musts. Failure rates are high—83 percent of acquisitions fail to produce expected returns,² and only 26 percent of transformations are deemed very or completely successful.³

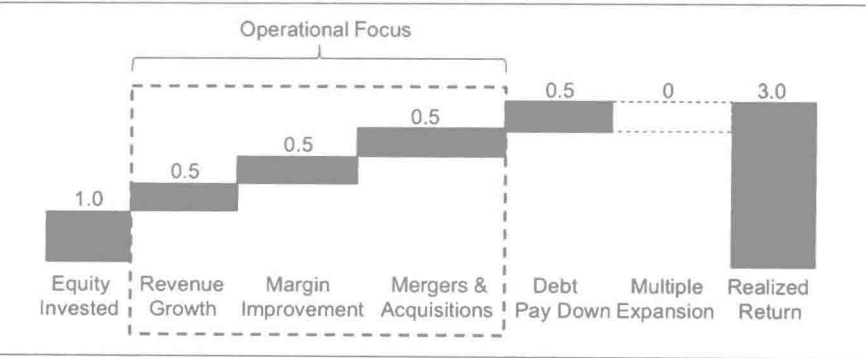
This won't happen to you. Not if you let us help you.

Let's start at the beginning.

Our fundamental, underlying concept is that onboarding is a crucible of leadership and that:

Leadership is about inspiring and enabling others to do their absolute best together to realize a meaningful and rewarding shared purpose.

**FIGURE 0.1 Value Buildup in Private Equity (Notional Example)
in Billions of Dollars**



Source: Capital Roundtable Conference, September 2014.

² KPMG study, reported by Margaret Heffernan, 2012, “Why Mergers Fail,” CBS Money Watch, April 24.

³ Study by Rajiv Chandran, Hortense de la Boutetier, and Carolyn Dewar, 2015, “Ascending to the C-Suite,” McKinsey Insights, April.

It's not about you. It's not even about those following you. It's about the shared purpose, the cause, and what you and they hear, see, believe, feel, and accomplish together as a team. Leadership is about your ability to create a culture in which your team can deliver remarkable results and love doing it. Effective leadership occurs when a team's behaviors, relationships, attitudes, values, and environment are synchronized to achieve the best results possible.

The Chinese philosopher Lao-tzu expressed this particularly well more than 2,500 years ago:

"The great leader speaks little. He never speaks carelessly. He works without self-interest and leaves no trace. When all is finished, the people say, 'We did it ourselves.'"⁴

With that in mind, this is a practical playbook complete with the tools, action plans, timelines, and key milestones you need to reach along the way to accelerate your own and your team's success in your first 100 days and beyond.

Our insights are gleaned from our own leadership experiences and from the work of our firm, PrimeGenesis, whose sole mission is to help executives and teams deliver better results faster during complex transitions. Across all of our clients, the 100-Day Action Plan approach has reduced the failure rate for new leaders from the industry average of 40 percent to less than 5 percent. Our top 10 onboarding clients have deployed us more than 140 times.

Since 2003, leaders and teams in public multinationals, such as American Express and Johnson & Johnson; in midsize entities owned by private equity firms, such as MacAndrews & Forbes and Clayton, Dubilier & Rice; and in not-for-profit organizations, such as the Red Cross, have implemented the 100-Day Action Plan. They have deployed it across a wide range of functions and complex transitions, including executive onboarding, turnarounds, start-ups, reorganizations, and merging leadership teams during acquisitions.

The core principles and techniques we deploy to make our impact on senior leaders and teams are described in this book. *The New Leader's 100-Day Action Plan* is the same plan we help executives develop and deliver in work with clients. The tools work for leaders transitioning into new roles or merging teams at any level, in any environment.

⁴ Paraphrasing the seventeenth verse of the *Tao Te Ching* by Lao-Tzu.

Over the years, we have noticed that many new leaders show up for a new role happy and smiling but without a plan. Neither they, nor their organizations, have thought things through in advance. On their first day, they are welcomed by such confidence-building remarks as: "Oh, you're here . . . we'd better find you an office."

Ouch!

Some enlightened organizations have a better process in place. They put people in charge of preparing for leaders' transitions. Imagine the difference when a new leader is escorted to an office that is fully set up for him or her, complete with computer, passwords, phones, files, information, and a 30-day schedule of orientation and assimilation meetings.

Better . . . but still not good enough.

Even if the company has set everything up for you, if you have waited until your first day on the job to start, you are already behind with the odds stacked against you. Paradoxically, the best way to accelerate a complex pivot like going into a new role is to pause long enough to think through a plan before you start, put it in place early, and then get a head start on implementing it.

As the leader, you must align all stakeholders around a shared purpose and set of objectives, set a compelling direction, build a cohesive leadership team, and create a culture that enables excellent execution.

As it turns out, these are some of the most difficult tasks faced by leaders entering complex situations, made even more challenging when compounded by the need for speed.

Having a process and set of tools can help you use your first 100 days to meet these challenges and propel you down the path to success. The four main ideas are:

1. **Get a head start.** Day One is a critical pivot point for people moving into new roles or merging teams. In both situations, you can accelerate progress by getting a head start and hitting the ground running. Preparation in the days and weeks leading up to Day One breeds confidence; and a little early momentum goes a long way.
2. **Manage the message.** Everything communicates. People read things into everything you say and do and everything you don't say and don't do. You're far better off choosing and guiding what others see and hear, and when they see and hear it, rather than letting happenstance or others make those choices for you. Start

this process with your current best thinking before Day One and adjust steadfastly as you go along.

3. **Set direction. Build the team.** The first 100 days is the best time to put in place the basic building blocks of a cohesive, high-performing team. You will fail if you try to create the organization's imperative yourself, without the support and buy-in of your team. As a team leader, your own success is inextricably linked to the success of the team as a whole.
4. **Sustain momentum. Deliver results.** Although the first 100 days are a sprint to jump-start communication, team building, and core practices, it's all for naught if you then sit back and watch things happen. You must evolve your leadership, practices, and culture to keep fueling the fires you sparked and deliver ongoing results.

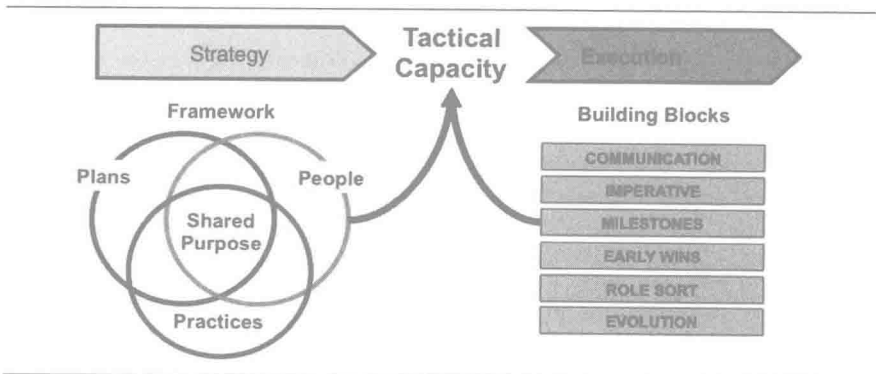
These four ideas are built on the frameworks of highly effective teams and organizations and flow through the book (see Figure 0.2). It's helpful to explain them up front. First, the headlines:

High-performing teams and organizations are built of people, plans, and practices aligned around a shared purpose.

Tactical capacity bridges the gap between strategy and execution, ensuring that a good strategy doesn't fail because of bad execution.

Six building blocks underpin a team's tactical capacity: communication, Burning Imperative, milestones, early wins, roles, and then ongoing evolution.

FIGURE 0.2 Core Frameworks



People-Plans-Practices

An organization's or team's performance is based on aligning its people, plans, and practices around a shared purpose. This involves getting strong *people* in the right roles with the right support, clarity around the strategies and action steps included in *plans*, and *practices* in place that enable people to work together in a systematic and effective way. The heart of this is a clearly understood, meaningful, and rewarding *shared purpose*.

Tactical Capacity

Tactical capacity is a team's ability to work under difficult, changing conditions and to translate strategies into tactical actions decisively, rapidly, and effectively. It is the essential bridge between strategy and execution.

In contrast with other work groups that move slowly, with lots of direction and most decision making coming from the leader, high-performing teams with strong tactical capacity empower each member, communicating effectively with the team and the leader (you), to come up with critical solutions to the inevitable problems that arise on an ongoing basis and to implement them quickly.

The objective is high-quality responsiveness; it takes cohesive teamwork to make it happen. High-performing teams build on strategy and plans with strong people and practices to implement ever-evolving and acutely responsive actions that work.

It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change.

—Attributed to Charles Darwin

You probably have seen this yourself. You may have been on teams with members who operate in disconnected silos, incapable of acting without specific direction from above. They may know the strategy. They may have the resources they need, but any variation or change paralyzes them. The Federal Emergency Management Agency (FEMA) actually had run the drill on a major hurricane in New Orleans months before Katrina hit. But the plan collapsed with the first puff of wind because no one could react flexibly and insightfully to a situation that was different from what FEMA had expected.

In contrast, a great example of tactical capacity at work was the way the National Aeronautics and Space Administration (NASA) team members came together during the Apollo 13 crisis. Right from “Houston, we’ve had a problem,” the team reacted flexibly and fluidly to a dramatic and unwelcome new reality—a crippling explosion en route, in space.

The team went beyond its standard operating procedures and what its equipment was “designed to do” to exploring what it “could do.” Through tight, on-the-fly collaboration, the team did in minutes what normally took hours, in hours what normally took days, and in days what normally took months. This teamwork was critical to getting the crew home safely.

If you’re lucky, you’ve been on teams where actions and results flow with great ease, where team members know what is really required and intended and support each other in making those things happen. Those teams have tactical capacity.

As the new leader, it’s your job to orchestrate the alignment of people, plans, and practices around a shared purpose—and then build tactical capacity to ensure excellent execution. You must help key people co-create a Burning Imperative and deliver against it with a great sense of urgency. A Burning Imperative created this way is the antidote to silos and departments that don’t cooperate. Tactical capacity is not only about the team responding quickly to changes in external circumstances, but it also is about team members working well with each other in support of the team’s Burning Imperative.

Building Blocks of Tactical Capacity

The good news is that, as a leader in a new role, you can build tactical capacity into your team quickly by implementing six building blocks:

1. Drive culture and action with ongoing communication.
2. Embed a strong Burning Imperative.
3. Exploit key milestones to drive team performance.
4. Overinvest in early wins to build team confidence.
5. Secure the right people in the right roles with the right support.
6. Evolve your leadership, practices, and culture to deliver results continually.

The NASA team dealing with the Apollo 13 got each of these six building blocks in place, allowing it to react with tactical capacity of the highest order:

1. The culture had been strong. But everyone's communication reinforced the message that "failure is not an option" throughout the rescue mission.
2. The team's mission changed from "go to the moon to collect rocks" to the one Burning Imperative of "get these men home alive." This was galvanizing enough (as a Burning Imperative must always be) to transcend all petty issues and focus everyone's efforts.
3. The team's milestones were clear: Turn the ship around, preserve enough energy to allow a reentry, fix the carbon monoxide problem, survive the earth's atmosphere, and so on.
4. The carbon monoxide fix allowed the astronauts to stay alive and was the early win that made the team believe it could do the rest of the things that would get the crew back to Earth safely. It gave everyone confidence.
5. Everyone was working with the same end in mind but working in different and essential roles. One group figured out how to turn the spaceship around. Another group fixed the oxygen problem. Another dealt with the reentry calculations, and the spare crew did whatever it took to complete the mission.
6. Once the immediate issue and Burning Imperative had been resolved, NASA embedded rigorous practices to minimize risks and maximize performance as standard operating procedure going forward.

Even though you're unlikely to jump into a situation exactly like the Apollo 13 breakdown, in today's environment almost all leadership transitions are "hot landings," where you must hit the ground running to have a chance of success.

Often you will need to fix something, maybe a few things, fast. Sometimes you will have more time to plan. In most onboarding situations, you will have at least a few days to create an onboarding plan—especially if you give yourself a head start. Time is like air (without carbon monoxide!) to breathe, and a head start gives you time. Your first plan gets you moving in the right direction; it will evolve as you learn more and things change—which they will.

The 100-Day Action Plan

Here are the steps in the onboarding process—and the chapters in this book:

Get a Head Start

1. Position yourself for success: Get the job. Make sure it is right for you. Avoid common landmines.
2. Leverage the Fuzzy Front End: Jump-start relationships. Listen, learn, and plan before Day One.

Manage the Message

3. Take control of Day One: Make a powerful first impression. Confirm your entry message.
4. Activate ongoing communication: Establish leadership and begin cultural transformation.

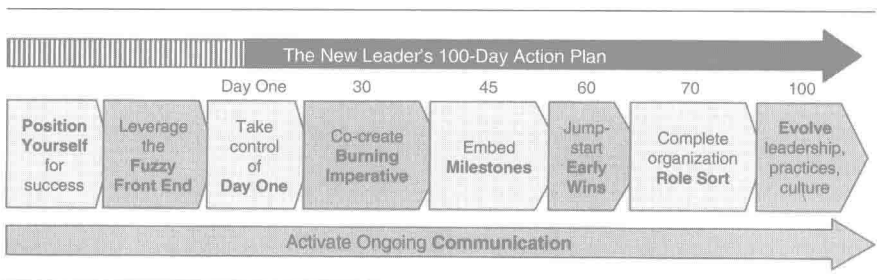
Set Direction. Build the Team

5. Pivot to strategy: Co-create the Burning Imperative by Day 30.
6. Drive operational accountability: Embed milestones by Day 45 and early wins by Day 60.
7. Strengthen the organization: Get the right team in place by Day 70.

Sustain Momentum. Deliver Results

8. Keep building: Evolve your leadership, practices, and culture to deliver results.

Figure 0.3 lays out the steps of the onboarding process, the 100-Day Action Plan.



Culture

In many respects, leadership is an exercise in building culture. However you define it, culture is the glue that holds organizations together. It may be the only truly sustainable competitive advantage⁵ and the root cause of every merger's success or failure.⁶ This book focuses on pivotal events, such as joining a new organization or merging teams, as opportunities to accelerate culture change and results. They are about creating and bridging gaps: gaps between a leader and his or her new team, gaps between an aspirational state and the current reality.

You must consider culture throughout your 100-Day Plan. Especially when you:

- Prepare for interviews (to answer cultural fit questions)
- Complete your due diligence (to mitigate organizational, role, and personal land mines)
- Choose your onboarding approach (by comparing the business' need for change to the culture's readiness for change)
- Converge into the organizational culture
- Evolve the organization's culture

Cultural elements are particularly critical to get right in a post-merger integration. Too little effort is paid to culture during integrations, 70 percent of those surveyed in the 2009 Post Merger Integration Conference acknowledged, with 92 percent claiming that greater cultural understanding would have substantially benefited mergers in their experience. And, respondents assigned blame for cultural difficulties to "poor leadership of the integration effort" as opposed to "wrong choice of target" by a factor of five to one!⁷ The message: Culture is critical, and leadership matters.

Keep culture a crucial consideration in everything you do. To help, you can find all the thoughts and tools on culture in this book pulled together in one document at www.onboardingtools.com (Tool 1A.10).

⁵ George Bradt, 2012, "Corporate Culture: The Only Truly Sustainable Competitive Advantage," *Forbes*, February 8.

⁶ George Bradt, 2015, "The Root Cause of Every Merger's Success or Failure: Culture," *Forbes*, June 29.

⁷ Clay Deutsch and Andy West, 2010, *Perspectives on Merger Integration*, McKinsey, June.

Communication—It Starts with Listening

The other thread that runs through the book is communication. Because everything communicates, guidance on communication belongs in every step and every chapter.

One idea that jars some people is the recommendation to craft your going-in message before Day One. Leaders wonder how they can do that before they've completed their listening tour. You will have learned a fair amount about the organization, its priorities, and its people during your interview and due diligence stages. If you know enough to have been offered and accepted the job, you know enough to craft an initial going-in message so that you can take control of your own entry. Take your current best thinking, craft a hypothetical message, and use that to direct your future learning.

**Chapter 1: Position Yourself for Success:
Get the Job. Make Sure it is Right for You.
Avoid Common Land Mines**

Leadership is personal. Your message is the key that unlocks personal connections. The greater the congruence between your own preferences across behaviors, relationships, attitudes, values, and environment and the new culture you enter or create, the stronger those connections and your message will be. This is why the best messages aren't crafted—they emerge. This is why great leaders live their messages not because they can, but because they must. "Here I stand, I can do no other."⁸

Knowing your own strengths and cultural preferences will help you better create career options that are a true fit for you, will allow you to do a better job positioning yourself in interviews (selling before you buy), and will help you do a thorough due diligence to mitigate risks.

**Chapter 2: Leverage the Fuzzy Front End:
Jump-Start Relationships. Listen, Learn,
and Plan Before Day One**

At this point you've made the choice—but you haven't started yet. There's a temptation to take a deep breath and relax. Don't do that.

⁸ Attributed to Martin Luther at the Diet of Worms, 1521, when asked to recant his earlier writings.

What you do next, what you do before Day One, can make all the difference. So, choose the right approach for your situation, draft a plan, and get a head start.

There are a couple of dimensions to choosing the right approach. First, the approach is different if you're joining a new company, getting promoted or transferred from within, running a private equity-owned business, crossing international boundaries, or merging teams. Second, the business context and the culture's readiness for change will inform your choice around whether to assimilate in slowly, converge and evolve, or shock the organization with sudden changes.

Armed with the choice about your overall approach, you're ready to create a 100-day plan targeting the most important stakeholders up, across, and down—both inside the organization and out, laying out your best current thinking around your message, what you're going to do between now and Day One, on Day One, and over your first 100 days and beyond. These efforts include prestart conversations to jump-start your important relationships and learning, as well as focus on various aspects of your personal setup.

These steps are especially critical in merging or restarting teams where no one will focus on the strategy or team until they know what their own personal role and responsibilities will be in the new order. Thus, two important steps in a merger or acquisition are to (1) complete an initial role sort (possibly even before the deal closes) so that you are able to inform all team members of their new roles and (2) enroll the leadership team in the change process, starting with co-creating the combined team's initial change messages.

MasterCard's Ajay Banga managed his Fuzzy Front End and early days particularly well. He leveraged the time after he had been announced as CEO but before he started by casually, but pointedly, interacting with key stakeholders with a simple introduction: "Hi, I'm Ajay. Tell me about yourself."⁹

⁹ George Bradt, 2011, "Why Preparing in Advance Is Priceless: How MasterCard CEO Ajay Banga Planned Ahead for His New Leadership Role," *Forbes*, February 23.