

Transitioning to a New Manager

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Your manager is leaving the organization. A new manager from the outside has been announced but has yet to come on board. The organization has degenerated into a state of chaos. You are a midlevel manager who is awaiting a C-level executive, and you find yourself in a position to discern your present and decide your future.

There are some key, high-leverage questions that can help you frame your context and assist you in finding a path forward. Imagine that I am your executive coach, taking you through three “minicoaching” sessions (in a real-world situation, these steps would probably be presented in several sessions).

To begin, let’s consider these basic characteristics of leadership:

- ❑ *Reflection* and *discernment* are key skills and processes that leaders need to develop in order to be effective.
- ❑ Leaders are *courageous*, always conscious of the freedom and responsibility that come with making choices. They don’t let anxiety hamstring their actions.
- ❑ A leader’s life is oriented toward serving others; that is, it is an *ethical* and *integrity-filled life*.
- ❑ *Polarities*, *dilemmas*, and *tensions* are part of life. Leaders learn how to frame them and leverage them to increase their effectiveness.

A word about polarities, too. Polarities are opposing forces—the two sides to a coin; for example, freedom/accountability, short term/long term, stability/change, reality/vision, safety/risk, ethics/courage, and loyalty/self-interest. These pairs of opposing values interact with each other; they are important because they influence us. And we are at their mercy if we are not aware of them or we misread a polarity as a problem.

For example, take the polarity of empowerment/control. We may favor empowerment, but when we focus too much on empowerment, we miss the value of control and thereby diminish our performance. As leaders, we have to develop the skill to identify, assess, and leverage both sides of that coin—it can’t be just either/or. We tap into the pair’s synergy to get the best of both values.

SESSION ONE: CONTEXT

Context, or the reality of your new situation, defines the boundaries of your possibilities and options. We all have highly developed defense mechanisms that can keep us from seeing or accepting reality. In fact, most leaders are either in denial about their context or, worse yet, unaware of it. However, accurate diagnosis here is absolutely critical. Once you understand your context and accept the reality of this change, you can begin the process of assessment.

Ask yourself these questions about your situation:

- ❑ What is the context of your industry? What is the next wave? *Is there a next wave?*
- ❑ What is the context of your geographic area? Is it possible to leave the organization and find a comparable position locally? Or do you have to leave the area to secure something similar?
- ❑ What is the context of your organization? Is it "more of the same," or does this development represent a culture change? Or is it something in between? Is there a merger about to happen?
- ❑ How will your context in the organization be affected by the manager's leaving? Will the organization's worldview change? How long will it take for the change to play out—and how long before you know about it? What risks are there for you now?
- ❑ What is your individual context—are you early career, midcareer, or early-onset late career? How solid is your financial situation?

SESSION TWO: ORGANIZATION/UNIT

At the organizational level, a key member is leaving. This has already had several impacts—or will have potential impacts very soon. What are they? How will the organization address these effects? Was this person an icon or a train wreck?

Example: A senior leader announces her resignation five months in advance of her departure. The announcement shifts the person and unit to lame-duck status, with both the manager and the unit's brand suffering, relationships deteriorating (internally and externally), key work being put on hold,

and results slowing to a snail's pace. Loyalty begins to suffer; truth is sacrificed. Strategy implementation is forfeited for the short term; the team grows political, risk averse, and focused on safe decisions, rather than following its aggressive path of the previous three years.

You are a manager on that team. Now, assess your own situation. How do you find the courage to continue to be effective? How might you build or continue to build a culture of leadership in your unit? Ask yourself:

- ❑ What is available to you now? Are there opportunities that weren't there before, and can you explore them at this point? Is it time to start a project or initiative that might move things along? Is there a possibility for a promotion? Are there other levels of influence now within your reach? Especially if you are a woman, or if the leader of the unit was a woman, what does the change mean for you, and how can you leverage it?
- ❑ What is your assessment of your unit today? Is your team going through a major change as well? Where is it headed? What are others saying? What is the impact of this change on you? Might some aspects of the change be beneficial?

Example: In one organization, over a two-year period, a new CEO came in and hired several new senior-level executives from the outside. The culture was truly changed, with more layers of management added and a more outward focus resulting. The culture was being tightened up a bit as well. Metrics were established and revised with more accountability. Those who were able to accurately read the situation were more effective and happier than those who either couldn't or

wouldn't read the environment and accept the reality of the situation.

- ❑ How does the organization in its current state help or hinder you in your progress? How might you help or hinder the organization's progress?
- ❑ What is the relationship between your manager's departure and the organization's strategy? Was your manager a "dinosaur" who needed to leave? Or was he or she a key member of the leadership team whose departure will be a significant loss? Whatever the situation, how did that manager contribute to the organization?
- ❑ Shifting to your peers, in what ways might you partner with other middle managers during this time of transition? After all, others in the organization at your level are experiencing similar concerns—there is a system impact. Is there a way to work together to get results? How might you work with other midlevel managers to gather data, address transition issues, or prepare for the new manager? If there's no current structural support for such a partnership, could you create one and sustain it? If you are a woman, are there other women in the organization you might reach out to and with whom you can build support?
- ❑ What is life giving in the organization, and how might you build on it? Conversely, what is toxic, and how can you address it?
- ❑ How else can you prepare for your new manager? Do you want to be involved? Perhaps you could gather some data on the state of the unit and prepare a report.
- ❑ How might you best serve your employees right now?

In short, you need to determine what obligations you have to yourself, your team, your

peers, and the organization. What symbolic role do you play in the organization? What commitments go with that role? How can you be courageous during this time of transition? These are ethical concerns, as well as personal and business ones.

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Example: In a very tense merger situation, the top two executives were not having a good time of it—in fact, the relationship had suffered immensely owing to some perceived injustices, and there was legal action contemplated. It was during this time that one of these executives decided to retire. The other executive, scheduled to speak at the retirement party on behalf of that outgoing executive, was reluctant because of the discord and possible legal action. However, institutional obligations required that she represent the organization, say a few words, wish the person well in retirement, and leave. To not perform that role would be to ignore the obligations that go with the position of CEO.

SESSION THREE: INDIVIDUAL

It is important to take the time to reflect on where you are as well, so that you are clear about your choices, intentions, and actions regarding how you serve the organization. Here, you may encounter the firm/flexible polarity. How can you be both firm (in terms of values and principles) and flexible (being more open) during this time of transition? Here are some key questions:

- ❑ Do you find yourself at a crossroads in your career? That is, are you at mid-career,

facing some decisions? Or is your skill set outdated but you're not yet ready to retire? Do you have family obligations, increased or lowered ambitions, or other concerns that require your attention now? What's most important to you now? How does that fit into your plans?

- ❑ What kind of person are you or will you be during this change process? What principles, values, and characteristics can you rely on to help you at this time? How will you be tested? What can you do to mitigate potential damage?
- ❑ In what ways are you resisting the change? Do you regularly seek feedback? Are you willing to bend? To expand your comfort zone? Will you seek help in doing this?
- ❑ How can you avoid being overwhelmed, indifferent, or insensitive during this time? How will you maintain self-discipline and continue to be accountable?
- ❑ How will you guard against lies or gossip? How will you address these when they show up? Will you recognize the evil in yourself and others? How will you address these if/when they occur?
- ❑ What new competencies will you need? Or how can you repackage yourself to meet the new demands?
- ❑ What truly motivates you? And will you be able to maintain that motivation? Do you need to adopt different or higher values to manage this transition? Motivation is really a "why" question: why am I doing this or not doing that? If you are feeling anxious, it may be that you are resisting going deeper to connect with your basic "why."
- ❑ How will you deal with actual and perceived losses, whether tangible or psychological? This is key to being a leader. How will you address those losses for

yourself—and how will you help others cope?

- ❑ What gave your work life meaning prior to this transition? Will that purpose still be there? Think about the psychological and actual contract you made with the organization. Do you need to renegotiate? Is renegotiation even possible? How will you harness your free will to move forward during this time of transition? What can you say yes to? And when will you say no? How you use your free will accounts for your results during this transition.

THE ROLE OF HR

Your organization's HR department might help you in this change process. Find out what services might be available to ease the transition. HR best plays a consultative role, providing a range of services that can assist you and your unit. For example, HR might be able to:

- ❑ Provide an organizational context, consisting of current strategy documents, new initiatives, and so on.
- ❑ Have statistical data relevant to your role in the organization.
- ❑ Assist you with development of a 90-day transition plan.
- ❑ Offer management resources for your staff, including navigating the change and transitions training.
- ❑ Offer the services of an executive coach, a mentor, or other advisors.
- ❑ Conduct a session to identify things the new manager needs to know about your team or unit.

One of the best ways to transition to a new manager is to set up an integration

process as a part of his or her onboarding and orientation. The goal here is to use a structured process for the new hire to become rapidly acculturated. This establishes expectations among key stakeholders and the employees. It calls for getting a quick read on the issues that face the organization, leading to creation of an initial plan of action.

FINAL QUESTIONS AND TIPS

At this point, you should be able to answer the following questions:

- ❑ What goals did you set for yourself? How well did you do in meeting them?
- ❑ What questions remain for you as your new manager assumes leadership? How are you going to get answers to them?
- ❑ Where do you want to be in six months? What will you do if you do not get there?

The following are some final suggestions for making a smooth transition to a new manager.

- ❑ If you applied for the job and didn't get it, have a conversation with your new manager within the first week. Chances are he or she will already know about that application. Although this conversation may not be easy, it can build trust and credibility in you as a leader.
- ❑ Have your 90-day plan in place and working.
- ❑ Be courageous—push your limits and expand your comfort zone. Take one risk per week for the first 90 days. It doesn't have to be large; just try something new.
- ❑ Have a purpose and a vision for yourself. Know your limits, but keep that vision forefront in your mind.

- ❑ Find a way to honor the old ways while ushering in the new. Help your new manager to do the same.

By delving deeper into the questions all leaders ask when facing a major transition, you will clarify your thinking and assess your situation, thereby giving you a pathway on which to move forward with courage.

SUGGESTED READING

The following sources have had a significant influence on my development as a leader, and you may find them helpful as well.

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