

## **Road Map for Creating your Entry Plan**

### **I. Promote Yourself**

**This is about making the mental break from your old job and preparing to take charge in the new one. Don't assume that what has made you successful to this point will continue to do so. You are in a new role in a new place. Make the transition mentally.**

1. Are you being promoted from within? If so, people have only seen you in the role you have been playing? Minimize relying on past success. Everyone has an urge to work one level below where they are. Work where you are, not where you were.
2. What has made you successful so far in your career? Can you succeed in your new position by relying solely on those strengths? If not, (and not likely), what are the critical skills you need to develop?
3. What do you need to do to ensure that you make the mental leap into the new position? Rework your network a bit. From whom might you seek advice and counsel? Focus on milestones and envision what it looks like to be successful at the end of the first week, first month, 90 days, etc.)
4. Be clear about your strengths. In what spheres do you most enjoy solving problems? How will you compensate for your vulnerabilities? Remember the tools of self-discipline, team building and advice and counsel.

### **II. Accelerate Your Learning**

**Climb the learning curve as fast as you can. You need to be systematic and focused about deciding what you need to learn and how you will learn it most efficiently.**

1. Are you effective at learning about new organizations? Do you sometimes fall prey to the action imperative? To coming in with "the answer"? If so, how will you avoid doing this?
2. What are the most important things you need to learn? What questions will guide your early inquiry? Given the questions you want to answer, which individuals are most likely to provide you with solid actionable insights?
3. Build a solid learning plan. Think about the following questions and remember that the learning process is cyclical: collect information, analyze it, distill it, develop hypothesis and test them.
  - a. What methods will you use to learn all that you can about the organizations?

(Structured interviews with direct reports, and other slices of the organization, focus groups, survey data about climate and employee and customer satisfaction, data on operations and student achievement)

b. What are the biggest challenges the district is facing (or will face) in the near future?

c. Why is the organization facing this challenge?

d. What opportunities should we be pursuing and what do we need to do to prepare ourselves to take advantage of these opportunities?

### **III. Match Strategy to Situation**

**Diagnose the situation you are entering into accurately; clarify the challenges and opportunities. A clear diagnosis of the situation is an essential prerequisite for developing your action plan.**

1. Diagnose the situations in play. Likely various portions of the organization are facing different situations. (start-up, turnaround, realignment and sustaining success)
2. Once you understand the situations at hand, which of your skills and strengths are likely to be most valuable in your new situation and which have the potential to get you in trouble?
3. What is the prevailing frame of mind among those involved? What psychological transformations do you need to make and how will you bring them about?
4. Focus your energy. How much emphasis will you place on learning vs. doing?

### **IV. Secure Early Wins**

**Early wins build your credibility and create momentum. This matters! Determine what those early wins in the first 90 days look like and then make it happen. Enlist the help of others in identifying what the early wins could look like. Those early wins will become part of the story people will tell about you.**

1. Given your situation, what should be the timing and extent of each of the waves of change you envision?
2. Based on what you know now, what are your top priorities? Given these priorities, what do you need to do during your transition to lay the necessary groundwork for achieving them?

3. Are there adult behaviors that need to change? What can you begin to do to change behaviors during your transition? Describe as vividly as you can the behaviors you would like to encourage and discourage.
4. How do you plan to connect yourself to your new organization? Who are your key audiences, and what messages would you like to convey to them? What are the best modes of engagement?
6. What are the most promising focal points for your early performance-improvement efforts? Select one focal point and think about how early wins in this area could serve as a model for how you want people to behave.
7. Given your sense of the changes you may want to make, in what areas do you need to engage in collective learning?

## **V. Negotiate Success**

**Begin the work of building a productive working relationship with your new board. Manage their expectations. Plan for careful conversations and include getting support for your entry plan.**

1. How effectively have you built relationships with new bosses in the past? What have you done well? In what areas do you need improvement?
2. Create a plan for different types of conversations.
  - a. *Situational Diagnosis conversation* - seek to understand how your board sees and understands the situation you are walking into;
  - b. *Expectations conversation* - seek to understand and negotiate expectations where possible under promise and over deliver;
  - c. *Style conversations* - what is the desired form and frequency of interaction, communication, level of detail, type of issues, etc.
  - d. *Resource conversations* - what are the resources needed in the early stage of the work (\$, time, support, etc.);
  - e. *Personal Development conversations* - identify strengths, but provide insight into those areas you are working on and may need support;

## **VI. Achieve Alignment**

**You are the chief organizational architect. You have to figure out if your organization's key strategies are sound and bring your structure into alignment with strategy. You have to pay attention to developing the systems and skills that are needed to realize your strategic intent.**

1. What are your early observations about misalignments among strategy, structure, systems, skills, and culture? How will you dig deeper to confirm or refine your impressions?
2. What early decisions do you need to make? How and when will you make these decisions?
3. What is your current assessment of the coherence of the organization's strategy? Of its adequacy? What are your current thoughts about changing your organization's strategy?
4. What are the strengths and weaknesses of the organization's structure? What are you thinking about potential structural changes?
5. What are the core processes in your organization? How well are they performing? What are your priorities for process improvement?
6. What are the functional and dysfunctional elements of the culture? What can you begin to do to change the culture?

## **VII. Build Your Team**

**You need to be systematic and strategic in approaching the team building challenge. How much time will you take to determine if you have the right people in the right seats. Manage what is expected, what you may know, what you don't know and need to find out. Early moves in this area can be big-wins or can become your baggage.**

1. What are your criteria for assessing the performance of members of your team? How do the people you inherited stack up against these criteria?
2. What personnel changes do you need to make? Which changes are urgent and which can wait? How will you create backups and options?
3. What process will you put in place to make the high priority changes? What can you do to preserve the dignity of the people affected?
4. What help will you need with the restructuring process, and where are you going to find it?
5. How do you want your new team to operate? What roles do you want people to play? Do you need to shrink the core team or expand it?
6. How do you plan to manage decision-making? Will you start off emphasizing a consult-and-decide or a build-consensus approach?

## **VIII. Create Coalitions**

**This is huge. Your success depends on your ability to influence people outside of your direct control. Take the initial steps to build supportive alliances. From day one identify whose support is essential and figure out how to line them up on your side.**

1. Whose support do you most need to succeed? What existing coalitions seem most powerful?
2. "What influence networks are most important to you? Who defers to whom on key issues?"
3. Who are your potential supporters? Potential opponents? How will you test your hypotheses about support and opposition?

## **IX. Keep Your Balance**

**Maintain equilibrium and preserve your ability to make good judgments. The risk of losing perspective, making bad calls and getting isolated and off track are ever present during transitions. Maintain control over your work environment and your personal transition. The right advice-and-counsel network is an indispensable resource.**

1. What are your greatest vulnerabilities in your new job? How do you plan to compensate for them?
2. What personal disciplines do you most need to develop or enhance? How will you do that? What will success look like?
3. What can you do to gain more control over your local environment?
4. What can you do to ease your family's transition? What support relationships will you have to build? Which are your highest priorities?
5. What are your priorities for strengthening your advice and counsel network? To what extent do you need to focus on your internal network? Your external network? In which domain do you most need additional support: technical, political, or personal?

## **X. Expedite Everyone**

**Help your new direct reports get up to speed with your expectations quickly. The quicker that takes place the more you will help your own performance. The benefits to the organization of systematically accelerating everyone's transition are vast.**

1. Whose transitions would you most like to accelerate? How might you begin?
2. What can you do to better support the transitions of people who come in from the outside?
3. What can you do to create common language or framework for those things you want to accelerate?