



# New Leader Assimilation



Doris Kovic  
Facilitator and Business Coach  
[www.leadinginsight.com](http://www.leadinginsight.com)  
T:949-429-8137



## **Accelerated Relationship Building For New Leaders**

*" Its the best way to iron out rumors and confront the issues that arise with a new manager, and to create a climate of openness*

.....Bill Hunt, GE Power Systems

A change in management can easily derail even the most productive teams as they try to understand how to work successfully with a new manager. Most of the time this transition happens slowly as individuals interpret their managers actions and comments and draw conclusions about what is required of them in this new world. Through trial and error individuals learn the working practices and preferred style of the manager. Its an unsettling time that reduces productivity and creativity.

At Leading Insight we have successfully used the New Manager Assimilation process, to ramp up the integration of a newly appointed managers with his or her direct reports. This facilitated half day session, can compress months of getting to know their new manager to a few intense hours, ensuring that a team quickly becomes productive after a management change.

It is a simple process that requires excellent facilitation and coaching skills to be effective. It is a kind of brainstorming session combined with an intervention that gets everyone on the team off to a strong start.

The purpose of the Manager Assimilation process is to ramp up the integration of a newly appointed manager/leader with his or her direct reports. This process is a valuable step to ensure that a team quickly becomes productive after a management change.

## The Process

### 1. Preparation

Select an objective and neutral facilitator that has excellent coaching and facilitation skills and has experience of facilitating the process.

Although this is a simple process it is often not easy to facilitate effectively. When executed well it will reveal and address misconceptions, blind spots and enable everyone in the team to unite, building trust and a shared vision of how to work together. It can be every powerful.

The facilitator you select needs to be independent from the team and ideally outside

The facilitator meets with the new leader to build commitment to participating in the process and to prepare for a successful session. The facilitator explains how the process will work, the expected benefits and the leader's role in the process.

The new leader schedules the assimilation meeting and invites the entire team to participate. The meeting should be held in person, within 2-6 weeks of the start date, in a private conference room. Typically these sessions require a half day, and are often combined with a team building activity.

### 2. Assimilation Meeting

The meeting begins with the new leader welcoming everyone and stating his/her goals for the meeting. The facilitator then reviews the steps of the process and establishes agreement that everything discussed in the meeting will be anonymous. The leader then leaves the room.

The facilitator then provides the team with a list of questions that will be discussed with the group.

1. *What do you already know about the new leader?*
2. *What would you like to know about him/her to work effectively?*
3. *What are his/her expectations of you?*
4. *What should he/she know about us?*
5. *What does he/she need to know to be successful in this new role?*
6. *What significant issues need to be addressed immediately?*



The facilitator then leads the group through a discussion to get everyone's input on each of the questions. It is likely that there will be different perspectives that can be discussed. Key points are recorded on flip charts and written in a way that preserves anonymity.

The group then takes a short break. During the break the facilitator meets with the leader to give a high level summary of topics discussed.

The meeting then reconvenes with the group and the leader and the facilitator reviews each of the key points captured on the flip charts line by line with the leader and clarifies the points as needed to ensure understanding. Throughout the review the leader should address the comments/concerns/questions to build understanding and alignment of expectations. The facilitator manages the dialog to ensure healthy and open discussion that is constructive. The facilitator should also capture agreements and actions on the flip chart.

The leader thanks the group for participation and commits to getting back to the team by a specified date on any open issues.

### **Follow-up**

The facilitator meets separately with the new leader to review the session, provide any additional feedback and coaching, and define next steps for the teams development and the leaders on-

### **When Should You Use An External Facilitator**

- Need an independent facilitator that has the coaching and facilitation skills to manage the process and ensure that the team works together well to achieve its purpose.
- A more challenging group dynamic that requires a higher level of facilitation skills than is currently available in house.
- Guaranteed neutrality and anonymity to ensure that participants feel able to speak openly.
- Provide feedback to the leader that will be seen as being more objective and unbiased than any internal facilitator could provide.