

# How to Successfully Onboard an Executive



Create a successful, effective, and informative orientation program that will ensure both the leader's and company's future success. Consider these guidelines for implementing a specialized program and effectively onboarding senior leaders:

- **Outline Onboarding Expectations.** It's true that the onboarding of high level executives is a bit of a different animal. The new exec, focused on making a strong impression, may not wish to appear confused or uncertain, and in some cases there may be no supervisor to ask. Some of these hesitations can be mitigated by outlining, in advance of Day One, what will be required/undertaken through the onboarding process. Expectations – for the exec and the company – can then be established regarding critical acclimation activities and any stigma linked to “elementary activities” defused.
- **Identify the values, mission, and struggles your organization faces.** An in-depth look at your company's business and position in the market helps to provide a complete context. It is also important to analyze the culture and people. How do employees interact? How are processes completed? These questions and unique perspective will provide a complete 360-degree view for your executive. Since it takes time to learn about a new organization and all its unique facets, it is important that the executive fully understands the organization before making any decisions. In order to assist with this understanding, it may be beneficial to provide a coach for day-to-day advice on decisions before they are made. This coach should be an expert in the political and cultural environment.
- **Create Relationships with Stakeholders.** Onboarding activities should carry a heavy focus on meeting key stakeholders – and those stakeholders aren't always evident from an organizational chart or top customer listing. Discussion guides prepared by HR and/or other VPs can work very well in such meetings because new execs may not know the questions to ask. Also, including a subset of similar questions in each meeting can reveal unique perspectives. Remember, these meetings are not just to build a knowledge base; they are essential in building trust, a sense of shared understanding, and a common culture.
- **Identify main leadership competencies.** Pinpoint what main qualities (technical, social, etc.) are required in a leader. Train and provide resources accordingly. Develop a 90-day plan of specific actions that result in building relationships and understanding the culture.



Onboarding is a critical activity, regardless of your role or position in the company. For new executives it's even more critical, as onboarding encourages employee engagement and ultimately improve retention. Onboarding executive leaders is just as vital and it requires more than a simple one-size-fits-all approach. It necessitates similar thought and planning to be well-executed, but there are other key components to keep in mind for this level of employee.

- Utilize multiple modes of communication. Emails, the employee handbook, coaching, and peer mentors are ways to offer a well-rounded approach. Touch base at regular intervals—pre-employment, the first week, the third and sixth month, etc. This will help keep the new hire engaged and on track.
- Identify program metrics. Identify what will help you measure the effectiveness of the program and what you want the new executive to accomplish during the early stages. Metrics such as turnover, how long it takes to become fully acclimated, etc., will help you determine if your program is doing what it should. The metrics may also indicate that retention is poor and the program needs to be revised.
- Pair With a Coach. An outside coach familiar with the organization can be a valuable resource for a new exec. The coach can help by questioning when assumptions are made, when old frameworks interfere with the ability to see situations anew, and when overconfidence or unrealistic expectations surface. It is sometimes only in these meetings that a new exec feels comfortable expressing confusion or concern.
- Check-in regularly. It is important to have frequent check-ins with the executive. Make sure your door is open and there is clear communication. Ask the executive if he or she is beginning to feel comfortable in the new role, what is needed, and how you can help. These check-ins will also help you to renegotiate the executive's goals throughout the first year. Perhaps the executive is excelling in one area, but needs more work in another. You can revise the learning objectives and goals by communicating regularly.


Onboard executives well and you'll greatly enhance your chances of making true organizational strides. Omit or short shrift executive onboarding and you could find even more problems bubbling than before the arrival of your leaders. As with all onboarding programs, be patient. At minimum, it requires six months for an executive to be fully integrated into the new role. A one-year onboarding program is ideal. Exercising these strategies to support your new executive will ensure a more positive introduction and experience, and ultimately help your organization run efficiently.

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Some companies (and new leaders!) feel that previous experience can carry these new execs through any situation. Thus, why spend time “mingling” or sitting through a presentation that can just as easily be read? The answer is, because a crucial competency of a successful leader is understanding and harnessing the power of his or her corporate culture. Having cultural alignment across the organization, directed by leadership, results in happier customers, better ideas, and more engaged employees. New leaders cannot make gains by shortchanging the amount of time they spend working into their new role.

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