



How to Onboard Your New Boss

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You've just learned that you will soon have a new manager. What can you do to help your new leader launch successfully? You can help your new leader (and yourself) by actively onboarding them.

According to research from Egon Zehnder, there are three main reasons why onboarding leaders derail: 1) They fail to understand how the organization works; 2) They don't fit with the organizational culture; and 3) They struggle to forge alliances with peers. Our research shows that being promoted from within does not eliminate these onboarding challenges. Leaders we surveyed said internal promotions were 70% as difficult as coming in from the outside.

So, whether your new leader is an internal or external hire, they're going to need your support. And the best way to offer your support is to guide them up the learning curve. Doing so means first assessing what they most need to learn and then helping them understand how to accelerate their learning process. Here are our recommendations for how to accomplish both of these steps along with real-world examples from leaders we surveyed.

Assess what your new manager most needs to learn.

There are three fundamental types of learning when starting a new role: technical, cultural, and political.

Technical learning is about understanding what it takes to succeed in the job. It involves learning about customers, products, technologies, and systems, as well as getting up to speed with the specifics of the organization's roles, goals, capabilities, KPIs, and performance.

Cultural learning is about understanding the key behavioral norms that govern "how we do things here" as well as how to speak the local language (e.g., acronyms).

Political learning is about understanding how decisions are made and how power and influence work, as well as identifying the key stakeholders and clarifying the decision-making processes.

Where you focus your attention will depend significantly on the situation. If your new manager has been promoted from within, they may already understand a lot about the culture (although there may be important cultural nuances associated with moving to a higher level). So, the focus is likely to be more on technical learning (about aspects of the organization with which they are not familiar) and political learning (about how power and influence work differently at the new level).

If your new manager is coming from a competitor, they likely will be familiar with important technical aspects of the job, such as knowledge of products, markets, and technologies. So cultural and political learning may be their biggest priorities.

Help them understand how to accelerate their learning process.

Here you'll find the three types of learning we mentioned earlier along with questions to ask yourself so that you can determine what your new manager actually needs.

Technical Learning

Questions to ask yourself:

What can I give our new leader to quickly bring them up to speed on our customers, products, systems, etc.?

What key reports or product information would be helpful?

What data would give them a strong understanding of the current state?

What historical data would offer insights into today's priorities?

In practice:

"I knew the new VP would need access to organization charts, financials, and marketing plans. However, knowing how to access this information on our intranet can be difficult," said one of the leaders we surveyed. "To support our new manager, we created documents with links that helped our VP quickly access the information needed."

"Being part of a large, global organization, there are mountains of data," said one team member. "When our new CHRO was coming, the team identified the most important historical information and shared our key success metrics. We also had talent, culture, and leadership data that helped our new leader better understand her team. She was grateful for the information and found that it speeded up her acclimation."

Cultural Learning

Questions to ask yourself:

What are the unwritten rules that would be helpful for someone coming in new to our company?

What insights into decision-making, collaboration, and working together would help someone integrate faster?

What are the culture-specific expectations or landmines that an incoming leader needs to know?

What acronyms are common in our company?

In practice:

For one new executive, understanding the cultural expectations and behaviors of business reviews allowed the leader to do extensive preparation before important meetings. "As I took the new role, one of my colleagues sat me down and said that I would be getting lots of questions on the finances and that the expectation was that I knew the figures cold. As an engineer, that meant spending significant time understanding the current financials and the reasons behind them. It took great effort, but it was helpful advice for my success in the role."

One leader joined a consumer packaged goods company with a long and rich history. Looking back, he realized the difficulty of navigating the culture. "When giving a PowerPoint, the expectation was that the company brand colors were used in a

particular way," he recalled. "However, they didn't share that with me. After presenting a proposal without using these colors, another leader told me it damaged my credibility. While it was an easy switch, it hurt me not knowing this from the start."

Political Learning

Questions to ask yourself:

Who are the key stakeholders the new leader should meet with in the near term, and is there anything I should share about them that would be helpful for the new leader to know?

Who are the key partners that the new manager will need to work with to move strategic initiatives forward?

Who are the external partners that work closely with this team?

What is a suggested cadence for meeting peers, stakeholders, and partners?

In practice:

For one leader, learning about the preferences of the company president proved especially helpful. "When I started on this team, someone pulled me aside and said that the leader was an absolute stickler for starting meetings on time. She viewed being five minutes early as being on time and those who came in on time as being late. She had no tolerance for anyone coming in after the start of the meeting. It was very helpful to me to have that insight."

“I have been with my global organization for over a decade,” said one officer. “While I was ecstatic to get a promotion to corporate headquarters, since I was coming from Europe, I did not have the network, the knowledge, or the understanding of how this part of the business operated. While everyone thought I did not need support in my new role, that was not true. I needed onboarding help, too. My coach helped me identify the internal relationships I needed to build for success within the corporate environment.”

In summary, many companies still give too little time and focus to helping new leaders succeed. If you have a new manager coming soon, identify how you can help them rapidly learn about the organization, the team, and the culture.

New leaders are drinking from a proverbial fire hose. Being in a new role can be difficult. Offering help, checking in, keeping them in the loop, and offering a listening ear can be very helpful to someone who is working on learning and trying to make progress at the same time.

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