

Leadership Transitions

Ensuring Success

Marla J. Weston, PhD, RN, FAAN



The intellectual capital of an outgoing leader is often underutilized in times of leadership transitions. The success of an incoming leader can be enhanced through a partnership where

the departing leader shares their expertise and insights on the opportunities, challenges, key relationships, cultural norms, and political nuances of the organization.

Leaders in health care are well aware of the critical importance of handoffs in patient care. Although we invest enormous effort in applying evidence-based strategies to ensure the accurate and thorough transfer of essential information during patient handoffs, we fail to apply the same rigor to executive or management level transitions. Just as lapses or errors can occur as a result of inadequate patient handoffs, failing to share comprehensive information during leader transitions can result in poor outcomes. Estimates are that a third of new chief executives fail within their first 18 months.¹ Of course, in some cases, the incoming leader does not have the essential skills to accomplish the role. However, in many other cases, the lack of success can be attributed to the board or hiring manager relaxing after the rigorous process of sourcing, screening, and selecting the candidate for the job, and consequently failing to effectively prepare the incoming leader for success in their new role.

THE CHALLENGE OF NEW LEADERSHIP ROLES

Health care leadership positions are challenging and complex, and as a result, any new leader assumes the role with both excitement and trepidation. The leader faces the pressing dual demands of needing to rapidly learn the organization and its challenges while simultaneously directing operations in a way that maximizes the strategic advantage for the business.

Yet, a leadership role involves more than managing daily operations or strategic direction in a vacuum. Nurse leaders need to enact change in complex organizational structures with diverse stakeholders. To be successful, a new leader needs to understand the political dynamics and corporate culture, including how new directions are determined, how decisions are made, how innovation occurs, and where the spheres and individuals with the most influence reside in the organization.¹

When the incoming nurse leader is an internal promotion, we often assume that they understand the culture and context. Internal promotions, however, carry their own complexities. An internal hire needs to navigate the transition from being a peer to becoming a boss, interact in a new way with internal and external stakeholders, and often are assuming a position with a level of responsibility that they have never experienced in any organization. They may also be challenged with needing to manage and hire for the position they are vacating while assuming the new role.

EVIDENCE ON SUCCESSFUL LEADERSHIP TRANSITIONS

What does the evidence report as some of the best practices for maximizing the success of a newly appointed leader? Primarily, that the leader onboarding process needs to involve more than orientation to the operations and issues of the organization. One of the most important areas of focus is providing the leader with a resource to guide them to build relationships with key stakeholders, understand the cultural norms and agendas, and to navigate political nuances of the organization. In this way, a new leader can navigate any necessary strategic or operational changes with the fundamental

insight about how the organization works that is necessary for successful implementation.

Much like in a patient care handoff, one of the best sources of information is the outgoing individual in the role. All too often, we thank the outgoing highly competent nurse incumbent with a celebratory party and trust that the incoming well-qualified nurse leader will navigate the organization with his or her own expertise. The opportunity exists to use the time of transition to take advantage of the intellectual capital of the departing leader, combined with the fresh perspective of the new leader, to enable a strategic gain for the business. The author, after having served as the chief executive officer (CEO) of the American Nurses Association for more than 8 years, supported the interim CEO, a new chief operating officer, and then the new CEO during the leadership transition. Through that experience, keys to maximizing a fruitful partnership and ensuring success during a leadership handoff were identified.

GUIDANCE FOR THE INCOMING LEADER

When new, garnering the perspective of the departing leader may be one of the most value-added activities in which to invest. Although the new leader can obtain information from many in the organization, the outgoing leader often has the most comprehensive and strategic understanding of the organization's issues and opportunities, and can be incredibly valuable in helping to convey the nuances of the cultural and political situation essential to effectively managing the circumstances. Candid, in-depth discussions between outgoing and incoming leaders allow for the transfer of valuable information such as opportunities for great short-term "wins" for the new leader to make a positive impression; the talents and weaknesses of the employee team; the strengths and challenges with internal allies and external partners; and the dynamics of the board.² In this way, the new leader can acquire a natural ally for their success in the role.

1. Rely on the depth of experience of your outgoing counterpart. They are one of your best sources of understanding the situation and background. Pay particularly close attention if and when they are advising you of past history that can inform your understanding and decision or if they are alerting you to potential landmines, pitfalls, or roadblocks. They understand the political landscape and culture from your position better than anyone else in the organization. Although it is always important to get input and information from a diverse group of people, recognize that your predecessor is the only one who has occupied your role and, as a result, is the only one who has that particular context. The departing leader can assist in creating a framework to better help you understand, organize, manage, and respond to the influx of information and demands that inevitably flood the new leader. Without this, any new leader could get swept away with minutia and over or underreact to opportunities or demands.
2. Confidently "own" your role and decisions. As a new leader, recognize that the decision to hire you was

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