

# Welcome Aboard

*An association executive's first months on the job are critical: They can either help a leader understand the organization's culture and stakeholders or alienate the CEO from staff and board members. With the right onboarding process, you can avoid the early missteps that make for short tenures.* | **By Jackie Eder-Van Hook**

In a recent interview, Kevin Kelly, CEO of executive search firm Heidrick & Struggles, said an internal study of 20,000 senior-level job searches revealed that “40 percent of executives hired at the senior level are pushed out, fail, or quit within 18 months.” Other studies don’t paint as dire a picture, but they do show that executive longevity can be hard to come by. A 2008 Booz Allen Hamilton study estimated the average tenure of a North American corporate CEO at 7.9 years. If the departure was due to poor performance, the average dropped to 4.6 years.

Association executives do better; according to ASAE, the average association executive tenure is 9.7 years. But those tenures are never trouble free, of course. In my work leading an interim executive management company and performing executive searches for associations, I’ve spent many hours reading, discussing, and writing about why some executives succeed and others fail. In that time, I’ve become convinced that the one difference is the commitment to executive onboarding by boards of directors, search firms, and the executives themselves.

“Onboarding” is management

speaking for socializing and assimilating new employees in the organization’s culture. In practice, corporate human resource directors have used the term to communicate benefits information for nonexecutive employees. But it deserves to be discussed in relation to CEOs, because strategies for onboarding executives are weak. They largely consist of passing the baton to an internal successor who learns by watching the retiring executive, on-the-job training when the former executive is no longer available (usually in the case of an unplanned transition), or an information dump as the departing executive dashes out the door.

In the best situations, the departing leader or interim executive paves the way for the new executive's entry with supporting roles played by the board, recruiter, and staff. Unfortunately, the best situation is frustratingly rare, considering the importance of the job. After investing considerable time and money recruiting the "right" candidate, boards seem to wipe their hands and walk away like a dealer at a blackjack table once the search is completed. They are tired and have done their job. Yet, there is a rich and untapped opportunity to jumpstart an executive's tenure and help ensure that the new executive starts out on the right foot.

### **The Board's Role**

Many recruiters recognize that they have an important role to play in onboarding. Korn/Ferry and Heidrick & Struggles offer distinct onboarding

decides to part ways and ends once the new executive is contributing to the organization.

What's involved in that process? In my research on leadership transitions and succession, I've found that leadership success correlates with learning the formal and informal culture, creating relationships, and building trust in the shortest time possible. Boards can enhance the leader's success by conferring legitimacy to the executive (as executives can with staff) through personal introductions. Sadly, this doesn't happen often enough. A number of executives I've spoken with indicated that their boards were at a loss to create a list of key members and stakeholders. Because one of the important roles associations play is connecting members, something seems amiss if our volunteers are unable or unwilling to identify key individuals within the profession or industry.

content knowledge. However, in associations it seems rare when the socialization process or onboarding tasks are explicit. It's critical for boards and search committees to create an explicit transition and onboarding plan that identifies which volunteers will make introductions, to whom, when, and who will attend events with the executive. Unlike taking your child to kindergarten, the process confers legitimacy and transfers power.

One example of getting a new executive off to a good start was at the American Geophysical Union (AGU). Last year, Christine McEntee, CAE, was selected to succeed my partner at Transition Management Consulting (TMC), Bob Van Hook, CAE, who served in the role as interim executive director for 19 months. He had prepared a detailed transition memorandum and shared his assessment of the interpersonal dynamics at play. "It is easy to get someone to provide an analysis of the business challenges," says McEntee. "But what was invaluable were Bob's insights into the people, their working styles, and interpersonal dynamics."

Working with consultant Seth Kahan, the AGU staff held a transition ceremony to acknowledge their experiences during the extended transition and to welcome McEntee. AGU's top elected leaders flew to Washington, DC, to join the celebration, and the event brought emotional closure to the transition period and formally and ritually put McEntee rightfully in charge of the organization.

At McEntee's suggestion, she and the board developed an onboarding plan that dedicated time to learning the staff, organization, and culture, followed by visits to member scientists' institutions, laboratories, and field sites to learn more about what Earth and space scientists do. When she's traveling, McEntee meets members in formal and social settings to discuss their hopes and desires for AGU. These visits help her build important relationships, learn the culture and substance of the organization, and identify

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services for executives outside of the search contract, while firms offer limited onboarding support as a part of their search contract.

While search firms play a role in onboarding executives, it ultimately is the board's job to support and orient the new leader. Not only does the board have the responsibility and right to hire and evaluate the executive, but it also has a fiduciary responsibility to ensure that the new executive has a reasonable chance at success. An executive transition is not a one-time event or transaction, but rather it is a process that begins when the executive or board

### **Two Good Starts**

Onboarding is akin to bringing a new spouse or significant other into the family. We introduce great aunt Mary, deliver a warning about the bean casserole, and give instructions about taking off our shoes in the house. We also share the largely unspoken or whispered family stories. In a family, it is easy to know who is responsible for making introductions, but it can be more complicated in an association.

Boards can decrease turnover by creating a formal onboarding plan focused on socialization (learning the culture), relationship building, and building

opportunities. The elected leaders and senior staff also identify key stakeholders from sister societies and policy officials for her to meet and facilitate those introductions.

At a previous association, the board provided McEntee with a highly skilled transition consultant. At first, she was concerned that the consultant was selected without her input. But ultimately she was delighted with the selection, because he helped with the critical role of onboarding. "In most associations, I think there is a gap in the governance," McEntee says. "They really need to do more to orient and introduce the executive."

At The Obesity Society, where TMC performed the executive search and provided interim-executive services, volunteers facilitated the attendance of TOS's incoming executive, Francesca Dea, CAE, at a well-regarded weeklong boot camp on obesity issues before her first day in the office. The highly

scientific course, designed for medical students, was of little practical use for Dea, but it familiarized her with the language of obesity research and treatment and clarified the expectations of professionals in the field. "One unintended benefit was the board's comfort with me and the growing trust," Dea says. "This brought us closer together and more committed to TOS's success."

In addition, TOS's board arranged a site visit to the chair's medical practice, shared insights about industry leaders, made introductions, and generously shared its knowledge and time.

### An Awkward Transition

I recently spoke with an association executive who, a few years back, took the reins of a medical society whose outgoing president was retiring after a long tenure. She and the outgoing executive were to have a three-month overlap, during which he would help orient her to the organization. Arriving

at the office that first day, she discovered that the retiring executive hadn't yet moved out; she was relegated to a small, windowless office. There was no transition planning, no welcome lunch, no written materials, no briefings, not even instructions on using the phone. She was on her own.

At first, she decided she would be gracious and let the situation play out. In the meantime, she began introducing herself to about 75 board members, staff, and key stakeholders. Within a few days, a senior staff director approached her and said, "This situation is awkward." She realized that the time for graciousness was over: She called her chair and within days the executive happily departed. During her first year, she retained him as a consultant for a few hours each month for the inevitable background, context, and political advice—a worthwhile investment and one that solidified their relationship.

These early conversations with stakeholders worked well for her, because they fit with what she and the executive committee had agreed to as her first-year goals: building relationships, listening to stakeholders, and assessing the organization. Of course, many associations may not think they have the resources or the luxury of time to allow their new executive to devote energy to making stakeholder calls and studying the organization. We should remember to make haste slowly.

While she came to the job as a senior leader at another medical association, this was her first role as chief staff executive. "If I had to do it all over again, I wouldn't wait to call the chair and move into the role for which I was hired," she says. "While it was a good learning experience, it was awkward for everyone. I recognized that no one would help me feel comfortable in my new role as an exec. People were waiting for me to be the leader. I had to take charge of my own onboarding process."

She found several resources helpful in her new role, including a sibling who was also an executive. One staff

## ONBOARDING ROLES

What's involved in giving a new executive a proper welcome? Jackie Eder-Van Hook lists what role each part of an association can play.

### Boards

- During the search process, prepare a list of key stakeholders.
- Clarify onboarding expectations with the outgoing executive.
- Create a ritualized transfer of power.
- Ask recruiters about their onboarding training and resources.
- Attend a professional-development course for CEOs and chief elected officers.
- Commit to sharing cultural information and making introductions.

### Executives

- Ask for relevant information during the search process, including onboarding plans.
- Engage the board and staff in your onboarding process.
- Look for opportunities to build many relationships quickly.
- Tie one performance goal to organizational assessment or relationship building.
- Schedule a weekly call for the chair, the new executive, and possibly the chair elect.
- Create your own "kitchen cabinet."

### Staff

- Provide staff bios, programmatic information, the most recent financial statements, and benefit-election and new-hire forms before the new executive arrives.
- Update the organizational chart, including approved but vacant positions.
- Plan a staff lunch for the first day.
- Update the website.
- Set up telephones and computers in advance.
- Ask the new executive what she needs as she transitions into the organization.

member took it upon herself to accompany her during her first annual conference. Additionally, she took recruiter Leonard Pfeiffer's advice to create a "kitchen cabinet" or inner circle of unofficial advisors. Entering her third year as president, her kitchen cabinet continues to be helpful.

The association's board, like many others, didn't recognize its role in onboarding the new executive. It erroneously assumed that the retiring executive would handle it. After all, they planned and budgeted for a three-month overlap. In this and other organizations, the exiting executive is busy dealing with his or her own departure issues and sometimes does not have the inclination or capacity to orient the incoming executive sufficiently.

### The Right Questions

As these examples suggest, during the recruitment process candidates should ask the search committee about the planned onboarding activities, including who will be involved and what dedicated resources will help the new executive enter the organization. The successful candidate should ask for information before he or she arrives in the office, including board and staff rosters, job descriptions, bios or resumes, and a list of key stakeholders. (One note of caution: Staff may need some reassurance that their resumes are for informational purposes only.)

Association professionals increasingly orient boards and volunteers, but they have not made their role in onboarding and succession planning explicit. Perhaps when they do, they will tap into the benefits that can accrue to the organization from conscious and strategic executive entrances and departures.

If Kevin Kelly is right and 18 months is the dividing line between executive success and failure, perhaps associations should negotiate an 18-month guarantee as a condition of search-firm selection. This conceivably could cause boards, search firms, and executives to treat executive transitions more like a

partnership and less like a transaction. Getting key players involved in planning and implementing onboarding activities for new executives is an important way to improve executive tenure. **en**

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*Management Consulting, an interim executive management and succession planning firm supporting associations and nonprofits. Additional onboarding resources are available at [www.transitionceo.com](http://www.transitionceo.com). Email: [jeder-vanhook@transitionceo.com](mailto:jeder-vanhook@transitionceo.com).*