

Executive Onboarding

The Unwritten Rules of Success

By: Barbara Kaufman, Ph.D.

Universities and colleges are struggling to compete for high quality senior administrative leaders. Tight budgets compound the challenge, since recruiting, selecting, and relocating candidates require significant investments.

While most institutions work diligently during the recruitment and selection process to get the best talent, too often they assume these highly qualified and accomplished individuals require little support to be successful. As a result, new senior administrative hires are left to assimilate on the fly and manage an already packed calendar of appointments. In light of high expectations, this misconception can set the stage for disillusionment and disappointment for the newly appointed administrator and the campus community. Left unchecked, this scenario can result in a premature erosion of confidence in the newly appointed leader, or an additional period of instability during which key initiatives languish if the administrator exits.

Institutions can avoid this conundrum by adopting a systematic onboarding process to welcome and integrate newly appointed administrators. Effective onboarding provides a vehicle for mentoring by introducing new administrators to the campus culture, unwritten norms, shared governance roles, and the importance of establishing critical relationships. The return on the investment in onboarding is that it contributes to a clearer vision and shared understanding of how things really get done on campus, reduces unnecessary misunderstandings, or worse, another costly rehiring process. It also facilitates a smoother transition for new senior administrative leaders, while saving the institution time, money, and frustration.

What is executive onboarding?

In “Onboarding: How to Get your New Employees Up to Speed in Half the Time” (Bradt, George; Vonnegut, Mary 2009), executive onboarding is defined as “...the application of general onboarding principles to helping new executives become productive members of an organization.” Whereas traditional orientation typically covers the basic information such as compensation and benefits, executive onboarding provides a more nuanced view of the organizational cultures and subcultures and how decisions are made. With executive onboarding, newly appointed senior administrators receive critical insider knowledge of interpersonal dynamics, governance practices and position expectations, which help facilitate an easier, more accelerated transition. According to “The New Leader's 100 Day Action Plan” (Bradt, George 2006, revised edition 2009), “Onboarding may be especially valuable for externally recruited executives transitioning into complex roles because it may be difficult for those individuals to uncover personal, organizational and role risks in complicated situations when they do not have formal assistance.”

As a more strategic approach to assimilating new hires, executive onboarding is slowly transitioning from the business world into the academic community. “Onboarding is more than understanding the roles of the position and having the skill sets,” according to Karen S. Haynes,

president of California State University, San Marcos. “It involves understanding the deep culture of the organization; understanding the interpersonal networks, not just the organizational chart, and it means knowing how to honor traditions and legacies while influencing organizational change.”

The case for executive onboarding in higher education

According to the Center on Budget and Policy Priorities (CBPP), tough economic times have prompted at least 43 states to cut assistance to public colleges and universities over the last few years. As a result of these and other funding cuts, universities and colleges are struggling to remain competitive in a resource scarce environment. Yet, institutions continue to invest a significant amount of financial resources recruiting senior administrators. According to NJ.com, Rutgers University’s latest presidential search cost \$226,532, which campus officials say was a relative bargain compared with their presidential search a decade ago, which cost nearly \$50,000 more.

With such large investments come high expectations. Because the newly hired senior administrator is deemed exceptionally qualified for the position, the individual is expected to hit the ground running and to succeed with little advice about a myriad of unwritten norms and cultural or political expectations. However, to ensure a successful assimilation to the new role and campus culture, successfully filling a position must extend beyond the recruitment and hiring process and the obligatory human-resource orientation.

Executive onboarding proactively addresses important details and information up front versus dealing with time-consuming problems and course corrections in the future. Executive onboarding additionally provides a positive experience for the candidate and the institution.

Derrick Crawford, associate vice president for diversity and educational equity at Cal State, San Marcos, recalls his onboarding experience. “My transition team played a critically important role in my onboarding and first-year success at Cal State San Marcos,” he says. “They served as an advisory board, providing me with sound advice on developing relationships early with key stakeholders, while at the same time providing counsel on avoiding pitfalls that were not obvious to me as a new administrator.” Crawford adds this immediate support allowed him to develop a strategic focus from day one that vastly contributed to his success.

In addition, executive onboarding addresses issues associated with the rising trend in hiring senior administrators outside the academic community. According to a 2010 study by the American Council of Education, only 30 percent of chief academic officers aspired to be college presidents. Two-thirds said that the work was unappealing. At the same time as appeal for the presidency is dwindling, higher education is expected to see a significant turnover in leadership over the next few years, due to retirement and other factors. As non-traditional candidates aspire to presidencies and other key roles (like a CFO becoming president), the onboarding process is going to be increasingly important because these presidents do not come from the academic side of the house.

Overall, executive onboarding provides new hires and institutions greater satisfaction from the beginning, resulting in a more cost-effective hiring process in the long run, with a shorter period of destabilization.

Challenges to effective implementation

Like any emerging idea in the academic community, executive onboarding can be challenging to implement. Some institutions question the time commitment required. Busy administrative staffs see more value in getting critical work done, over building a strategic network for the newly appointed senior campus leader and educating him or her about campus culture and subcultures. Other times, colleagues have good intentions to help the newly appointed leader, but their heavy schedules prevent them from following through. Job security concerns can also become an issue. Colleagues, worried about their own jobs and future, may feel intimidated by the new hire, causing them to be apathetic when it comes to helping the individual.

Intellectual arrogance on the part of the new hire can also be a contributing factor to ineffective onboarding. New senior administrative leaders may feel smart enough to go it alone and they don't ask for help or choose to ignore it. Often these talented individuals roll their success strategies forward from their prior roles and expect to be effective. Yet, they fail to recognize differences in campus cultures, leadership expectations of their boss regarding the level of collaboration and the campus shared governance model, or general decision-making practices.

With packed calendars, newly hired senior administrators often overlook the need to build a strategic network of colleagues and key constituents during their first 90 days. They get distracted from the fact that building collaborative relationships must precede focusing on tasks and implementing initiatives.

When onboarding doesn't take place

When institutions neglect onboarding, the consequences can seriously affect the new senior administrator's success. In one case, an institution president hired an external candidate who was a seasoned provost, knowledgeable in academic affairs, and experienced as a senior administrator. The president left town shortly afterward, instructing the new hire to move forward with several initiatives during his absence. Yet, no expectations were set concerning the new hire's pre-existing commitments during her first month. From the beginning, colleagues were unhappy with the new administrator's lack of visibility, and when she delegated work to her chief of staff, whom she brought with her from her former position, key colleagues were outraged that she had not built relationships with them first. By failing to build relationships and collaborate in advance of her actions, this administrator gave a negative first impression that could have been avoided with appropriate onboarding.

Crawford recalls an onboarding process for a newly hired female marketing executive. "My former employer epitomized the 'good old boy network' mentality and therefore wasn't particularly welcoming to new employees—female executives in particular. Because of the company culture and the lack of any substantive onboarding process, the female marketing executive left the organization after less than a year," he says.

Lack of executive onboarding can also cause erosion of confidence. An effective dean with 20 years at his former institution made the assumption his reputation would roll forward ensuring his success at his new college. Unfortunately, he neglected to build relationships with his new chairs and experienced a vote of no confidence. Through much soul-searching and executive coaching, he discerned the differences between the two campus cultures. He was then able to reestablish himself by focusing on relationships and influence skills, rather than using a directive style and expecting the chairs would assume good intentions. But this is not always the case. Haynes says she's watched many talented people fail because "...no one pointed out the land mines, helped introduce them to the informal organizational chart; helped them with 'low hanging fruit' for quick successes."

When a newly hired senior administrator fails to succeed, the institution suffers as well. Time-consuming relationship repairs are required, not to mention the additional expenses and searches if the individual leaves. The introduction of interim leaders also causes department disruptions, as shell shocked team members attempt to keep projects moving forward. In addition, the reputation of the institution can suffer, which can have lasting effects. Prospective candidates may hesitate to apply for a leadership role on a campus that does not effectively support new leaders, or worse, when candidates view the campus as a toxic environment.

Without effective onboarding, newly hired administrators may rely on their new direct reports rather than their colleagues at the cabinet level. As a result, they can get a biased view of issues and policies through the lens of their new division. With a narrow perspective, they are viewed as an advocate for their division, rather than a leader who takes an institutional view of doing what is best for the university.

Formulizing an onboarding process

Typically, the campus president or chancellor provides strategic input and champions the onboarding process for senior administrators. According to Haynes, "I recognized the importance of a successful onboarding process for senior administrators, like our new associate vice president for diversity, for multiple reasons. One was because of the long-standing campus support for this position; two because it was a brand new position to our university, and three because of the high expectations that the CSUSM community had for our newly hired chief diversity officer. I needed not only to mentor, but to protect his time and calendar in the beginning and to chart a path of relationship building while setting behavioral expectations." But since cabinet colleagues play a vital role in helping the newly appointed senior administrator successfully integrate and assume a shared sense of responsibility, formulizing the executive onboarding process is generally a team effort.

Through several brainstorming sessions, the president or chancellor, along with the full cabinet, develop and finalize a list of need-to-know information for newly appointed senior leaders. In addition, they compile a formal list of key constituents the newly appointed should meet with during his or her first three months. In separate meetings with individual cabinet colleagues, the president or chancellor discusses roles, role overlap, campus culture, political and cultural landmines, and campus reputation.

Implementing effective onboarding

Although every campus is unique, here are six steps to implementing effective onboarding once the new administrator takes office.

- Hold an initial meeting with the newly appointed senior administrator. Have the administrator's boss discuss in detail "how things really get done around here," what works and what doesn't work. Be honest about shared governance, policies and practices (written and unwritten ones), and expected levels of collaboration, especially across boundaries. Provide the new hire with the list of key constituents developed earlier.
- Assist the new hire in booking meetings with cabinet colleagues. For the next three months, help the new hire to build relationships and to understand the campus consultative process, role boundaries, and cross-divisional collaboration expectations. Assign a skilled "buddy" to facilitate introductions. This will help the new hire clarify and understand campus life, unwritten norms, etc.
- Suggest a key committee service for the new hire, and support his or her efforts. For example, consider the university budget council or IT governance committee or committee for a campus strategic initiative.
- Assign a lunch buddy to meet with regularly. This step enables the new hire to receive feedback about his or her progress, receive constructive criticism, and get advice on how to be more effective on campus.
- Schedule and follow-up with a mid-year self-assessment to discuss strengths and additional development needs. Ask the newly appointed administrator to give the president (or boss, if not the president) a one-page assessment on what the individual has learned and what his development needs are at this time. This is a non-threatening way to get role support needs on the table.

In today's competitive market, universities and colleges struggle to compete and recruit quality senior administrative leaders. With tight budgets and little time, the process can often feel like swimming upstream, but it doesn't have to be that way. By developing and implementing executive onboarding methods, institutions create a more proactive and productive process that facilitates success for all newly hired senior administrators. As a result, they reduce new hire dissatisfaction and disillusionment, avoid costly attrition, and move the campus toward realizing its full potential.

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