



Effectively
Managing
Transitions

REFINE

Collaborative Practices & No-Ego Approach Ensure Senior Executive's Success in Role Expansion

AVOID COMMON CAREER- DERAILING NETWORK TRAPS IN TRANSITION

Be alert to network traps that cause otherwise high performers to struggle or derail: the *biased learner*, the *disconnected expert*, the *formalist* and the *bottleneck*. Role transitions are high-risk times if you are not attuned to these career derailers.



MALE

Level: SENIOR LEADER

Industry: PROFESSIONAL
SERVICES

MANAGING TRANSITIONS

Entry into a new organization, changing roles, new responsibilities and promotion all place demands on you that can most efficiently be met by leveraging networks. Make transitions successful by investing in networks in three ways:

Initiate

Jumpstart productivity and inclusion by cultivating essential connections broadly and before you need help from others.



Engage

Energize people in your network and pull colleagues to you and your ideas when engaging with new groups.



Refine

Re-calibrate networks and collaborative practices for long-term effectiveness and well-being.



For half of his 30-year career, Niall has been creating and improving operations and processes in a specialized product

and services firm. He has managed teams to start up sales training systems, improve service quality and run sales operations. His deep knowledge of the business led to his current role as sales director for several product lines—a role that has expanded several times in the past three years.

Every time Niall adds another product or line to his portfolio, he takes on an additional account team while working extensively with internal support functions like client sales and services, marketing and IT to develop and implement the strategy. Sales account teams may be small and internal, or large with hundreds of external sales reps or temporary, seasonal hires. A recent expansion of his role involved bringing a product that had been managed by an outside firm back in house—essentially adding another business to his responsibilities. He needed to build out a new group to transition and grow the sales and servicing of the product.

A critical role for senior leaders in transition is to determine the relevance of their expertise and experience to the new role and then build out networks to supplement gaps quickly. Niall was clear that the fundamentals of his expertise (sales strategy, management and execution) were transferable, but he did not have specific knowledge of the product and its customers. “A different product has to be sold to new people ... I had to learn, to understand the product, its purpose, its value in the market. And, I needed to understand the needs of a new customer segment, a customer that is drastically different than the customer base for the other product lines.” This is where he invested time in building his network and deeper relationships.

First, Niall hired in a manager from the outside firm who had worked with the new product, knowing that her knowledge base and skills would be valuable and complementary to his. Then, he engaged with the marketing group and product manager—the business leader who sets the strategic plan and is responsible for the overall goals and outcomes of the product. “In sales, I am not an island ... Our sales plan—what we do, how we segment the customer, how we engage new customers, how we manage and sustain current customers—comes from that higher-level strategic plan and aligns with marketing ... So, product management and marketing are the two groups I have to engage with to do my business effectively.” He worked closely with the people who had product and customer knowledge to define what was effective and learn as much as possible about the potential market.

Because of Niall's history with the company and the breadth of his experience, he had ideas and could contribute to product strategy and marketing conversations. "I am trusted and respected, so people on those teams will ask my opinion ... But, I try to ask questions and listen." Rather than leveraging his tenure and experience, he chooses to trust and learn from others. **"It is easy to think you are smarter than you really are, but the reality is that you only know what you know ... You have to ask, *In this role, what do I know?*"** In doing so, Niall avoids becoming a "disconnected expert"—a person who over-relies on the expertise that led to prior success, but does not see and fill in gaps in skill or perspective when transitioning into a new role.

In new roles or new contexts, people need to morph their knowledge or adapt their approach. They need to build new networks and get feedback to help them see blind spots. Without others to help them understand the context and see what needs to change or be learned, disconnected experts don't achieve expected performance and organizations don't achieve desired outcomes.

For Niall, a part of this process is to be confident in his identity and reputation, without being arrogant. He does not feel a need to prove his worth by inserting himself into domains or topics where he is not an expert. "I don't have a problem admitting what I don't know. I don't need to be the smartest guy in the room. I can sit in a meeting for an hour and not open my mouth, except to say *hello* ... I only talk when there is a point to be made and where I have strong knowledge. I don't talk just to hear myself talk. I think that my sincerity and authenticity come out and that helps people feel comfortable."

As a leader, Niall sees that his openness to others creates room for a new group to collaborate, develop and perform in a way that is sustainable—not just produce short-term results. "The people who don't understand the extent of their ignorance tend to feel uncomfortable around people who do know something ... That makes for really interesting engagements. When ego and arrogance are in the room, it gets in the way of hearing what people are saying, prevents collaboration and progress."

Network Insights

- **Be honest about what you don't know.** Experienced executives must identify blind spots and skill gaps and build networks to fill in as they move into a new role or context.
- **Use your knowledge and expertise judiciously.** Be comfortable with sitting through an entire meeting and not saying anything besides *hello*.
- **Know your customers' needs.** The pursuit of their satisfaction should drive how you interact and collaborate with them, whether they are internal or external customers.
- **Build relationships (peers, other functions) before you need help.** Frame requests in ways that focus on their success as much as your own.

Personal Network Dimensions to Successfully Transition into a New Role: Advice from 30 Years of Progression

1. **Invest in the people and functions that support you.** "When I got here, I had no reputation. I had to quickly learn all the potential areas that could contribute to my success and the people I needed to engage with to get work done ... You've got to find out where the linkages are and know them before you need them."
2. **Gain a deep knowledge of your specific clients (internal or external).** "The customer is not always right. But, the customer and their satisfaction are paramount. Always be listening and invest time in building relationships that help you to understand and address this richly."
3. **Show people you are as interested in their success as your own.** "If we collaborate together effectively, we will *all* be successful; we will all shine ... When I engage people, I meet them where they are ... Not, *This is what I need you to do for me*. Instead, *This is what we need to do for us*."
4. **Engage people in ways that create a sense of purpose in the work.** "When people can see themselves in the vision and mission they perform at a much higher level because they see where they contribute."
5. **Know your leaders and their interests and motivations.** "I was taught that as a manager you have the responsibility to speak up if you see that something is not the best course and why ... Not every leader welcomes that ... You've got to know who your leadership is because it can really cause discomfort and pain if you don't know how to navigate that."

ABOUT THE RESEARCH & ROB CROSS

Building on 20 years of research with more than 300 organizations, the Network Leader Research Project seeks to understand the approach and strategies that enable certain leaders to consistently achieve peak performance. The research includes 160 in-depth interviews conducted by Rob Cross, Edward A. Madden Professor of Global Leadership, Babson College. The Connected Commons is currently focusing its research on leadership effectiveness, talent optimization and organizational alignment and change—three areas where network insights can clearly drive performance. For more information visit www.connectedcommons.com or email Rob at rlcrossjr@gmail.com.