TRANSITION MEETINGS – "Bringing the New Boss on Board"

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The effective use of transition meetings (attended by the new manager and his key subordinates) can facilitate a smoother start-up when a new boss arrives on the job. Transition meetings are a management technique used by the U. S. Army and the U. S. Forest Service (USFS). The following outlines on-the-ground experience with transition meetings, guided by a 1980s USFS pamphlet (now apparently out of print) called "Bringing the New Boss on Board."

When appropriately conducted, transition meetings can 1) reduce the loss of organizational energy that often hallmark managerial change; and 2) be a new manager's important first step toward developing a cohesive work team.

Transition meetings within the first two weeks of a new regime can:

- Build trust and respect by giving the new manager and subordinates an opportunity to know each other better.
- Establish organizational goals consistent with both the desires of the top management team and the capabilities and purpose of the organization.
- Allow each attendee to address his/her personal expectations of the new manager.

Transition meeting ground rules are:

- The transition meeting is not to place blame for current or past problems, nor a session in which decisions are to be made or problems solved.
- It is a "broad but shallow" meeting to provide the staff with an idea of the new boss's management style and expectations of them; and to provide the boss with information about the organization, the staff, and the pressing issues which demand immediate attention

Pre-meeting preparation includes giving the participants a self-introduction form containing questions to prompt them for information (e.g., what makes them want to do a good job, their perceived individual strengths, and weaknesses, and their "hot buttons."

This can be particularly valuable information, since most individuals (if asked) will provide accurate assessments of what management actions can motivate them, and what management approaches kill their initiative.

During the meeting, the new boss provides "who I am" information to the staff. This can help alleviate the unspoken concerns that are often particularly intimidating to staff members who fear change. Sharing includes:

- Individual management style/philosophy
- Individual strengths and weaknesses
- Pet peeves
- How he/she acts when angry
- What he/she expects of employees

It is recommended that the manager acknowledge specific circumstances that may make staff uneasy. For instance, if the new manager is female, she may choose to calmly acknowledge that some staff members may be concerned about that. A manager coming in as an “outsider” from a different district or agency may wish to address any anxiety that may cause.

Ann Christensen was one of the nation's first female District Rangers with the USFS when she became the Morehead District Ranger in 1986. As she told her staff during her transition meeting, "I have never worked for a woman boss before either -- it would probably make me feel a little uneasy at first, too."

Christensen also recommended that a new manager use the transition meeting to give employees vital statistics on any personal matters (such as age, marital status, children, etc.) that he/she wants them to know. Otherwise, certain members of the staff will expend a great deal of energy, and the organization's time, using the office grapevine to gather enough personal information to satisfy their natural curiosity about the new boss. Besides wasted time, the latter process may result in inaccurate information from unreliable sources (personal communication, April 1987).

The transition meeting should incorporate standard techniques for conducting successful meetings. This includes having an established agenda, scheduling meetings in the morning if possible (when staff members are traditionally more receptive and energetic) and starting the sessions on time. Likewise, effective facilitation of the meeting includes keeping the meeting focused, identifying, and repeating important issues, and implementing follow-up activities.

In many cases, the transition process requires a series of meetings that include one-on-one sessions between the manager and key staff members, as well as a session with the entire group present.

Transition meetings can help determine both the boss's and the staff's agenda for the first two to three months of the new regime. Templates for “who I am” can be modified to your situation.