

Foundational Tools for
Inspiring and **Enabling** Your New Team

FIRST-TIME LEADER



GEORGE BRADT and **GILLIAN DAVIS**

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**NOTE**

The 48 tools printed in this book are also available in a customizable format at www.onboardingtools.com. (See the First-Time Leader page.) We will be regularly updating these tools and adding videos and additional material on that page to give you the benefit of our latest thinking.

ACKNOWLEDGMENTS

Gillian sat at her desk. She had just become responsible for a small team of six—all of whom had been there a lot longer than she had and were a generation ahead of her. She knew what she wanted to accomplish; she just didn't know how to get there.

She picked up George's *The New Leader's 100-Day Action Plan* to find some guidance. Although very insightful, she found a lot of it was over her head, as she was not leading an organization but a small team. So she called him.

"George, just read your *The New Leader's 100-Day Action Plan* book. Really great stuff, but do you have anything for first-time leaders?"

"Thanks. Not at the moment. Why do you ask?"

"Well, I know a lot of people who are first-time leaders—they are either in a high-growth organization and are quickly building a team underneath them, are start-up owners that are expanding, or are in corporate and are being promoted without the right, or any, leadership training. Even in my own experience, I could really use a book to help me be not just a manager but a leader."

"I think you're right. Do you want to fill that gap together?"

"Yes."

And we were off to the races.

This book has many other roots. It is a direct descendant of *The New Leader's 100-Day Action Plan*, written with Jayme Check and Jorge Pedraza. Large portions were taken from other things George has written. We've referenced the specific articles "adapted" from Forbes.com, but not the pieces from *The New Leader's 100-Day Action Plan* or from the book *Onboarding* that George wrote with Mary Vonnegut or from *The Total Onboarding Program* that George wrote with Ed Bancroft. So thank you Ed, Jayme, Jorge, and Mary for your contributions.

Beyond them we must acknowledge the contributions of our past and current partners in PrimeGenesis. Their fingerprints are all over this book and all our books as we all work these ideas every day.

As always, we are indebted to the clients of PrimeGenesis and Alan Davis & Associates Inc. on several levels. We are the first to admit that we have learned as much from them as they have from us. We are blessed to have the opportunity to work with an extremely diverse group of clients. They run the gamut from the multinational to the small, public to the private, for-profit to the not-for-profit.

The leaders we work with come from many industries, from almost every discipline imaginable, and from many parts of the world. With every client, we have learned something new. Clients inspire, challenge, and teach us on a daily basis, and for that we are grateful.

To Meg, who seems to greet every one of George's new initiatives—from businesses to books to musical plays and everything in between—with a bemused look of “Oh no. Not again” and ends up supporting everything he does in a way no one else on the planet could begin to come close to, abounding gratitude.

To Gillian's parents, who gave her a platform to stand on, and to Kudzi, for enabling her to reach her dreams.



Part I

GETTING STARTED

Chapter 1

OVERVIEW: CONGRATULATIONS! IT'S GREAT TO BE A LEADER. YOU'VE EARNED IT. AND YOUR NEW JOB IS GOING TO BE A WILD RIDE

PART I: GETTING STARTED

"If only I had known then what I know now about leadership." Our vision is that years from now, this thought will never cross your mind. Most people become good leaders only after stumbling through new situations, making mistakes, and learning from them. Not you. You're going to benefit from several lifetimes of leadership insights, learning from others' mistakes and positive experiences to cut out a lot of unnecessary stumbling and pain and accelerate your success as a first-time leader.

Before we go any further, congratulations! If you're reading this, either you have earned a career-defining opportunity, or you are wise enough to reconnect with the fundamentals of leadership with fresh eyes. You should be excited. And you should temper that excitement with a healthy dose of concern. Your opportunity comes with a fair degree of personal risk. Forty percent of new leaders fail in their first 18 months.¹ That's why this book is for you. It's going help you mitigate the risks and accelerate success all at the same time.

When Gillian first started her role as manager, she went in with guns blazing. She assumed the best way to get people to buy into her ideas was to prove that she was capable. So she went off in all directions, trying to change processes, marketing plans, new product lines. It wasn't long before she realized that not only was this not working, it wasn't sustainable. She needed to be strategic, and most importantly, patient.

The number one problem first-time leaders face is failing to understand that leading requires entirely different strengths than does doing or managing. We've all experienced first-time managers who come in with guns blazing. They think they can be successful by doing more of what they were doing before and telling others to do the same. But telling diminishes. At best people comply with the teller's direction. More experienced managers persuade and support. Great leaders go one step further to co-create a purpose-driven future with their followers.

This gets us to our core premises:

- **Leading is different from managing.** Where managing is about organizing, coordinating, and telling, leading is about inspiring and enabling and co-creating. Great leaders can also do and tell when needed—and we're certainly going to provide you a broad set of management tools—but this is not a book written to help you write a budget or comply with labor laws. It is a book about leadership with a focus on inspiring and enabling others to do their absolute best together to realize a meaningful and rewarding shared purpose.
- **Taking over as a leader for the first time is a critical, career-defining moment.** Getting this transition right accelerates your career trajectory. Avoiding avoidable mistakes at this juncture requires preparation, commitment, and follow-through. Hence this book.
- **Focus on the cause.** People follow charismatic leaders for a time. But they devote themselves over time to the cause of a BRAVE leader who inspires and enables them in the pursuit of that cause. BRAVE leaders have the courage to accept that leadership is not about them, but rather about working through behaviors, relationships, attitude, values, and the environment to inspire and enable others.

This book provides foundational frameworks, processes, and tools to help by

- Laying out a way of thinking and a structure for action for your leadership at both conceptual and tactical levels. We'll tell you what to do next, later, never, and why, and how to accelerate success.
- Providing several lifetimes of leadership insights, examples, and stories from experienced leaders and experts to guide you through risk-filled situations you may not have experienced yourself—yet.
- Making available downloadable tools, easily adaptable for the situations you face. (Plus bonus tools and new ideas over time, online at www.onboardingtools.com.)

Happiness is good. Actually, three goods: (1) doing good for others, (2) doing things you're good at, and (3) doing good for you. These three goods come together in great leaders. Great leadership flows from a passion for a cause—inevitably a

cause with a meaningful impact on others. At the same time, these leaders invest in making themselves ever better leaders on an ongoing basis. As a result, they reap abundant personal rewards: good for others, good at it, good for you.

There are real costs to becoming and being a great leader. Assuming you've got the talent and inclination to lead (and not all do), you need to invest in acquiring knowledge and skills. It's a never-ending effort. You are going to be frustrated along the way. You are going to make tough choices, giving up some personal comfort in pursuit of your cause. You are going to be stressed. You are going to fail. Then you are going to get up and do it all over again. Why? Because the impact and rewards far more than offset the investment and costs.

We are going to give you a process for taking charge, a framework for leadership, and then apply those across small, medium, and large teams to accelerate success. Here's the flow by chapter for the chapters following this one.

Take Charge of Your New Team

When moving into that first-time leadership role, get a head start, manage your message, build your team. Get a head start by having a plan and putting an emphasis on jump-starting relationships. Manage your message by making sure what you do matches what you say matches what you fundamentally believe. Then apply the components of the BRAVE leadership success framework to build your team.

The BRAVE Leadership Success Framework: Behaviors, Relationships, Attitudes, Values, Environment

Behaviors are the actions that make real, lasting impact on others.

Relationships are the heart of leadership. If you can't connect, you can't lead.

Attitude encompasses strategic, posture, and culture choices around how to win.

Values are the bedrock of a high-performing team. Get clear on what really matters and why.

Environment sets the context for everything else in terms of where you are playing.

PART II: BUILD YOUR BRAVE LEADERSHIP FROM THE OUTSIDE IN

Behaviors flow from relationships. But you can't get there until you're aligned on environment, values, and attitude choices. Thus we suggest leading from the outside in: from the environment, through values and attitudes, to relationships and behaviors. As a first-time leader, it's hard to know where to start; you have expectations coming at you from all angles: your boss, your boss's boss, your peers, your team. If you don't build yourself a platform to stand on, you will not be able to stand for long.

Environment: Get Clear on Your Mission and Fields of Action

One of your most important choices is where to play. Understand the context in which you're operating and interpret and create the context for your team. The context includes both what others have decided for you and the choices you and your team get to make. Today's environment is highly uncertain in exciting and dangerous ways. So be sure to consider all the risks and opportunities both outside and inside your field of endeavor and organization. You may never have had to consider the external environment in your previous role, but now it's your responsibility to do your homework.

- Understand the business and competitive environment, organizational history, and recent results.
- Align around an interpretation of the situation assessment.
- Make clear choices around where to play and where not to play within your context.

Values: Align Yourself and Your Team with the Organization's Mission, Vision, and Values—More or Less

Virtually every long-serving leader says that the number one job of a leader at any level is to own and drive vision, mission, and values. Clarify what matters and why—the value you and your team create, and the drivers and principles you choose to follow within the context of the overall organization. All too often, this exercise is overlooked. Just because your manager did not do this, does not mean you should skip it as well.

- Align on a shared purpose: vision, mission, values as the foundation for all that follows.

Attitude: Make Crucial Choices around your Team's Strategy, Posture, and Culture

Strategy, posture, and culture comprise the pivot point between environment and values and relationships and behaviors. Decide how you are going to fulfill the mission you've been given—how you are going to win. To change your organization's behaviors and relationships, change its attitude. Make choices around strategy (which may be someone else's substrategy) and then be sure your posture and culture are in sync with those choices.

- Clarify strategy, posture, and culture to guide relationships and behaviors.

Relationships: The Heart of Leadership

Everything you do and don't do, say and don't say, listen to, and observe communicates—24/7, forever. This is the heart of leadership. Inspiring and enabling others is all about relationships. This is probably the biggest shift for first-time leaders. At least it was for Gillian. Shifting from executing the work to delegating the work was one of her biggest challenges, and continues to be one. You are changing habits and doing a 180-degree change on how you perceive your role. This doesn't happen overnight, and you'll be happy to have the tools in this book to keep you on track.

- MAP your communication: Message, Amplifiers, Perseverance.
- Build an ADEPT team by Acquiring, Developing, Encouraging, Planning, and Transitioning talent over time.

Behaviors: How You Get Things Done through Other People

Environment, values, attitude, and relationships all inform behaviors and what impact you and your team make. It's all theoretical gibberish until you put it into action. Remember that activity is not the same as impact. So focus everyone on those few behaviors with the greatest impact.

- Focus the team on what creates the most value for your team's internal and external customers across the value chain: design–build–sell–deliver–support.²

PART III: LEADING SMALL, MEDIUM, AND LARGE TEAMS

Mange teams differently as they grow.

With Teams of Less Than 10 People, Adopt a Start-Up Mind-Set

If you are starting or joining a small team, lead with environment and values. The critical questions are where to play and what matters. Build everything else on these over time. Play where you can solve someone's problem. Then assemble your early team of complementary partners. Not everyone on the team needs to have strategic, operational, and organizational strengths. But someone on the team should, and all must buy into the same values.

- Play where you can solve someone's problem and build the strengths required to solve that problem either in your early team or through external partners.
- Lock in core values.
- Gain early momentum and keep going until it's time to stop.

Lead Teams of 10 to 20 Like an Extended Family

Once the team grows beyond a nuclear family with everyone reporting to one leader, the nature of how the team works changes. At this point, attitude starts to become more important. Get the strategy set, deciding at what you are going to be best in the world, and use that as your guide for how to grow the team and which capabilities to add first. With teams of 10 to 30 people or so, you'll know everyone and can treat them like extended family. Even so, this is the time to implement rudimentary people-management and operating practices.

- Choose what you are going to be best in the world at.
- Let that choice guide team expansion priorities.
- Agree on the main tenets of your culture and start implementing operational practices to embed those tenets.

If You're Leading More Than 30 People, Hierarchy Is Your Friend

While it's not likely your first leadership team will have more than 30, it does happen. The more likely scenario is that you start with a smaller team and grow it. Once your team has more than 30 people, you need to get over your natural abhorrence of hierarchy and start substituting some organizational and operating processes for your ability to know everyone on the team. With this size team, lead with relating and behaviors (how to connect, what impact). Work on the organization. Put in place enabling practices to scale. And remember the number one job of the leader is to own and reinforce vision and values. This gets ever more important (and complicated) as the organization grows.

- Work on the organization.
- Put in place enabling practices to scale.
- Reinforce vision and values—the number one job of a leader.

Call them what you want: moments of truth, moments of opportunity, moments of impact. Whatever you call them, leadership and life itself is a series of them. Whether planned, unplanned, seen, unseen, known, or unknown, they go by in a flash. This is especially true for first-time leaders in their first interactions with their new team members, their first tough decisions, their first hires, fires, failures, and successes.

To capture those moments, to take full advantage of those opportunities, engage with the prelude ahead of the moment, the moment of impact itself, and the follow-through after the moment. The BRAVE framework applies. During the prelude, think through environment (where to play), values (what matters), and attitude (how to win). This sets you up for the moment of impact and relating

to others (how to connect). Then follow through to ensure all focus on those few behaviors with the greatest impact (what impact).

Leaders are defined by their followers. The only way to achieve your vision, in line with your values, in the context you choose, is through the attitude, relationships, and behaviors you model and engender in your followers. It's not about you. It's about your cause. It's not enough to have compliant followers, doing what they must. It's not even enough to have contributing followers. You need followers committed to a deserving cause. Be BRAVE yourself and help them be BRAVE individually and together in a winning BRAVE culture.

Throughout, our emphasis is on the application of principles. This is a book and set of tools to be used and referenced, not something to be read through, considered, and put aside. Note, the 48 tools printed in this book are also available in a customizable format at www.onboardingtools.com (see the First-Time Leader page). We will be regularly updating these tools and adding videos and additional material on that page to give you the benefit of our latest thinking. Finally, just as you as a first-time leader must inspire and enable others, we hope to inspire and enable you to be a BRAVE leader this time and every time.



