

The Teams, They Are a Changin’

*A Model for Getting Up to Speed Quickly
When Integrating a New Member Into the Team*

by Dr. Madelyn Blair & Robert Clymire
Pelerei, Inc.

Introduction

Alexander the Great (356-323 BC), who conquered the Greek City-States and the Persian empire, understood the importance of replacing a soldier fallen in battle and integrating his replacement quickly. The lives of other men depended on it. Coaches of professional and amateur sports, who recruit a star player, understand they must answer that same question: “How to get the team up to speed quickly?” Given the recent phenomenon of key players coming and going at a surprisingly frequent rate, today’s CEO faces the same challenge as Alexander the Great.

This article provides a leadership model for successfully managing the integration of a new member into a senior management team amidst difficult times. Whether imposed by the tragedy such as 9-11, a shifting economy, competition, or mergers and acquisitions, the phenomenon of membership turnover requires reflection, direction, and new strategies. As one executive interviewed for this article said, “New people are jumping onto a moving train.” In the old days, senior leadership teams remained fairly stable over time, unified around shared responsibilities and clear goals. That picture has changed dramatically. Today’s CEO is lucky if the team stays intact for six months to a year.

The savvy leader of the 21st century must know how to integrate new members while keeping the team focused, committed, and producing results. Where executives once had the luxury to work with teams solely to develop and follow-through on strategies, our study suggests that leaders today must also be sharply attuned to the learning curve, team concerns, and changing interpersonal dynamics that result from putting a new member on the team raft during a whitewater run.

Our Model for Getting Teams Up to Speed Quickly is based on our work with leadership teams and best practices cited in interviews with over 20 CEOs and senior executives in private and public organizations, profit and not-for-profit. It encompasses four phases: membership, learning the social ins and outs, gaining savvy, and, ultimately, getting up to speed. The heart of what we found? Executives who manage this successfully share five fruitful strategies: (1) They relate to the change issue personally, (2) they talk about culture and context spontaneously, (3) they incorporate lessons learned from past experiences, (4) they are careful to keep their eyes on the big picture, and (5) they consciously use storytelling to convey their message quickly and effectively.

Storytelling, the “Secret Weapon”

Though these strategies all contribute to bringing in a new member successfully, the one that executives pointed to the most was using stories to create an authentic connection. All agreed they are one of the best teaching tools.

Stories convey job related knowledge. They increase the newcomer’s sense of inclusion, executives reported, and this sense of belonging is critical to contributing to the team quickly. Also, the listener’s reactions to the stories served as a barometer to better understand that individual’s challenges, expectations, and concerns.

The good news: everyone can tell a story. How the story was delivered and the function it served varied from leader to leader. Some took the new member aside, explaining the organizational culture through traditional company stories. Others intentionally modeled the kinds of behaviors (need an example from the interviews) that the team required to stay cohesive and productive. The natural storytellers loved to tell stories that helped the new person learn the ropes (need an example from interviews). Some invited the new members to informal gatherings at their homes where they joined in the storytelling that occurs in comfortable, social settings.

Storytelling can be an educative, memorable part of the integration of the new member. One called it his “secret weapon,” and an essential part of any game plan. Moreover, the true wonder of storytelling magic is the discovery that takes place on the part of the listeners as they uncover the connective meaning of the story for themselves. And stories are remembered long after the “facts” are forgotten. The leaders we spoke to agreed that stories have tremendous, long-term impact on the newcomer’s understanding of the team and the company. They agreed it is critical to look early on for ways in which revelatory stories can be told.

Our model, therefore, distinguishes the four phases of getting a team up to speed quickly as well as clarifies the role of storytelling in each phase.

Our Study: From The Movies to the U.S. Army

Twenty executives were invited to participate in our study. They included eight CEOs and presidents, nine vice presidents and directors, a school principal, and two retired executives from Disney to the U.S. Army. All felt the study was valuable and participated with enthusiasm (they had a chance to tell their stories!).

The authors developed a common protocol to guide the interviews that reflected their extensive knowledge about management and teams. Initial interviews were conducted to identify the questions that would best solicit proven strategies. The protocol was adjusted accordingly. The 20 interviews were conducted by three investigators (the authors and a third professional), over a three-month period, the results gathered, and a content analysis done. We adjusted the model based on what we learned.

Interviewees were given the option of remaining anonymous or releasing their names for attribution. All agreed to share their ideas and comments openly. Their wishes have been honored, although not all participants have been quoted directly. The responses included individual philosophy, organizational procedure, and personal experience. Everyone had a story to tell.

Begin The Process Before the Recruit's First Day

Closure is a natural part of the life cycle of teams. Rarely, however, do managers see this as an opportunity for bringing the team up to the next level. They may be troubled that a key member is leaving. They may be relieved because the departure signals the end to a personnel problem. An effective, productive integration process begins when a current team member leaves. How the leader conveys his or her response at this point – i.e., the stories they use to create closure – will set the stage for the new member.

“Dwell on the positive, or the person's complaints can spread through the group.”
Michael Orsati, Senior Vice President, Greenwich Capital Markets, Inc.

The executives we interviewed agreed: take time to acknowledge the change. They recommend telling the story of how it impacts you, as a leader, and to listen to the team's concerns and needs. There are a number of issues to address. When a well-liked member of the team leaves, for example, others may feel concern that her shoes won't be filled. Or, if the change is due to downsizing, the remaining members may feel guilty that they are still there, or might fear for their own jobs.

Our model addresses this important transition from the old to the new. Not surprisingly, the larger strategy of successful integration starts before the new team member is brought on board. Also, the departure of an employee offers the manager a business opportunity to hire a person with cutting-edge skills to take the team to a higher level.

Endings Before Beginnings

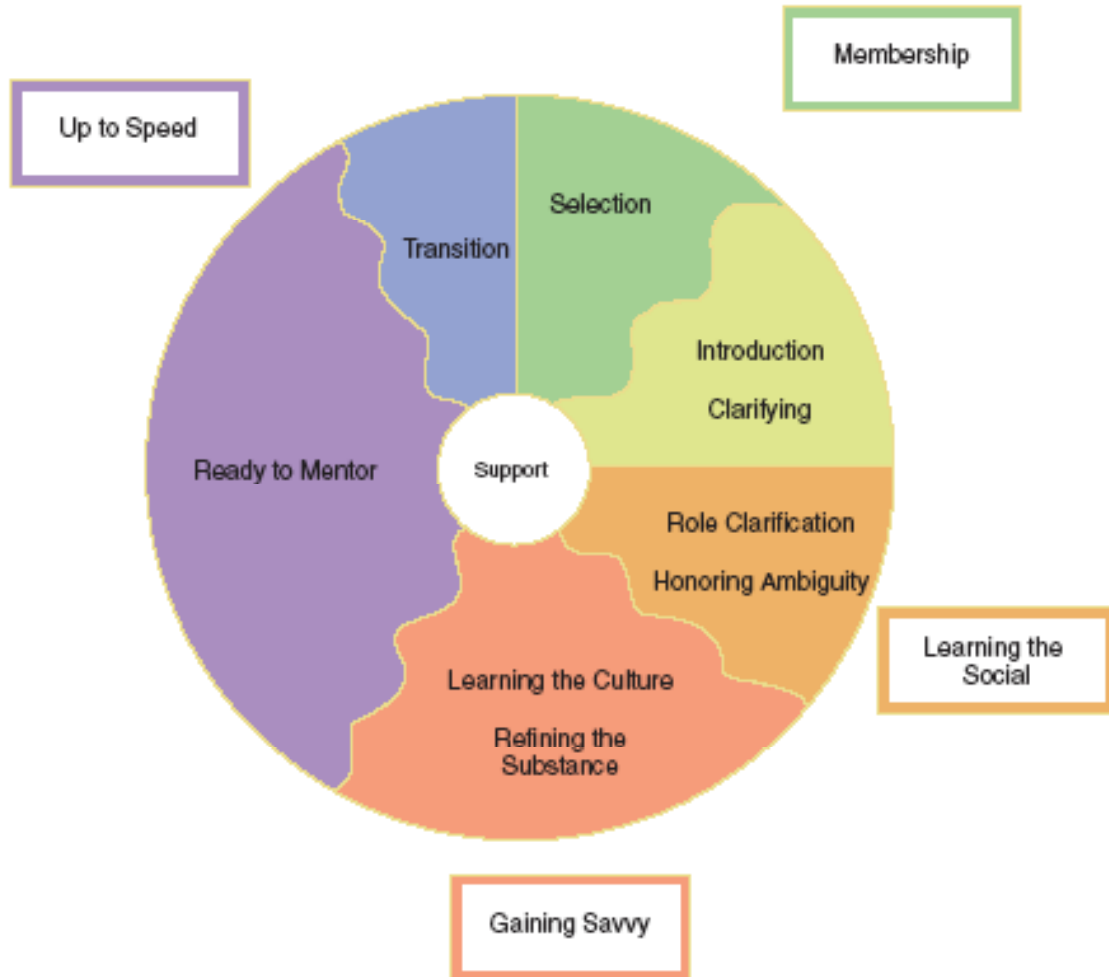
According to William Bridges in *Managing Transitions*, *“The single biggest reason organization changes fail is that no one thought about endings or planned to manage their impact on people.”* The same holds true for managing departures. Creating closure is often done through a celebration, but several executives we interviewed chose the occasion to share stories. They asked staff to share memories of working together with the person leaving. This helps those who remain behind to identify what they valued about that person. And, since storytelling in one form or another is inevitable when someone leaves, providing a public platform can help reduce the time that is often spent in smaller groups, rehashing the loss. This kind of an event can touch a team more deeply than a party, as it gives a “golden glow” to all.

“It's a very successful way,” volunteered one executive, “to manage the transition of a star – or anyone for that matter.”

Our interviewees noted that when the person is leaving because of a performance issue, the departure should be swift, appreciative, and clear. Managers should communicate the decision clearly, quickly, and with dignity. They should focus on the person's positive contributions, and be clear that they are leaving. For purposes of healing, transparent honesty is important. The excuse that there is little time for a genuine explanation does not hold water. The price for not managing such transitions effectively is both lowered morale and productivity.

When viewed as part of a larger management strategy, healthy closure leads seamlessly to the four-step model of integrating a new team member and getting the team back up to speed quickly.

Getting Your Team Up to Speed Quickly: Model for Success



The model's four stages: membership, learning the social ins and outs, gaining savvy, and, ultimately, getting up to speed, each contain sub-stages. In addition, the boundaries that lead from one stage to another almost always overlap. The secret weapon, storytelling, enlightens each stage and is described below with examples.

Stage #1:

Membership: The Selection Process

*"Inclusiveness is the key in the selection process."
Jane Pratt, immediate past President of The Mountain Institute*

Ownership is the foundation of productive teams. With ownership, teams reap the harvest of creative thinking, problem-solving, and efficient communication. Buy-in succeeds when the new player and the team members accept one another as a cohesive unit. A leader can ensure buy-in through team involvement in all steps of the process.

Save Your Time through Team Involvement

Teams will be more inclined to welcome a new member if they have participated in the selection. Some managers involve the team from beginning to end, while others ask them to participate in certain steps. One executive we interviewed turned the process over to the team until the final decision. She worked with them to confirm the role and characteristics of the person they wanted to find, and then said, “Come back to me with the final short list of three.” She has always found a qualified candidate through this inclusive approach. Whether the team participates in all or part of the process, their involvement is critical for buy-in of the new team member.

Another executive described trying to “save time” by doing the selection himself. He ended up having to recruit four times over before he found someone who could work compatibly with the team.

Two-Way Street: The Team Story

Even if not included in the final decision, some managers feel it is essential the team interviews the candidates. One executive said it gave them a stake in the outcome as well as an opportunity for the candidates to hear stories from the team’s perspective. The team gains a sense of the potential new member, and the candidate gains a much richer and more accurate picture of what it might be like to join that team.

A Lasting Introduction

*“Extend an extreme amount of quality time from the top during the early period.”
Bob Allen, CEO, i.d.e.a.s. at Disney-MGM Studios*

All members need to feel included, on both the informational and social levels. There are proven ways to help guide this.

“Welcome Aboard”

It is essential to introduce the new hire immediately. In doing so, leaders must be judicious with the stories they tell as they introduce the new member for they lay the groundwork for all future connections. One executive of an international organization said she issued an email with the credentials and other pertinent information to all staff, without exception. Over time, it became a norm for staff members to respond by sending a “Welcome” email to the new member.

If a company is small, the main means of introduction may be face to face, but the use of email to send formal credentials serves a useful purpose. No matter how it is done, the primary objective is to increase the understanding about the new person to facilitate inclusion and full membership.

Set Them Up for Success On The First Day

Membership-building activities can begin the very first day on the job. One manager said she meets new members for breakfast on their first day of work. She described one such meeting in which the new member was dressed more casually than was the organizational norm, so she offered to drive this person home to change. This new hire got off to a much stronger start as a result.

Creating full membership is especially important for the military. The Army helps create inclusiveness by assigning a “sponsor,” usually within a similar rank, age group and family situation. He or she might meet a new team member at the airport, invite them for dinner, give them a tour of the area, and assist them with paperwork. As one officer said, “By the time you finish the list of activities, they certainly feel at home and a member of the team. And in the process, you may even have a new friend.”

The Company Story

Formal briefings represent an important part of creating membership, as this is where the company tells its story. Meetings, books, and training seminars all offer valuable information. More importantly, the way they present this knowledge offers the new member insight into the organizational culture.

Inclusiveness emerges as pivotal to the success of managing the integration. There are a number of ways to support a new member in this process. Equally important, what helps the other members of the team feel comfortable in accepting the new individual? This is also critical for effective transitions, which we address in the next stage.

Stage #2

Learning the Social Ins and Outs Role Clarification

*“We run too fast to allow for anything less than clarity.”
Bob Allen, CEO, i.d.e.a.s. at Disney-MGM Studios*

As soon as introductions are over, we often expect team members to roll up their sleeves and get back to work. On one hand, focusing on tasks is a useful way to continue to integrate the new member. But when the team does so without clarifying the new role, the sense of inclusion that was started in the selection process can be undermined by confusion. Clarification can take place in a myriad of ways. The bottom line is that the team needs to understand how the new role and consequent input will contribute to their efforts.

Create A Story To Connect With Each Member at a Deeper Level

One executive used storytelling and listening to facilitate clarification. She asked each of the current team members to describe their concerns about accomplishing the team’s mission. As each member told their story, the new member listened carefully to the different versions. She was then asked to see how her role could support the mission, and was immediately engaged in contributing ideas. She not only knew what others did, but also had a deeper understanding of her role, and what her priorities should be. The exercise also demonstrated that creative thinking was a social norm for the team.

In addition to the mission of the whole team, team members can also invite the new member to offer assistance in their specific areas. This helps attach names and faces to specific issues. Further, if someone is struggling with a new information system, for example, this is an opportune time to raise that issue. Such disclosure shows the new hire how the team asks for support and throws light on priorities.

Learning a New Language

The new member is tasked to remember the names and concerns of new teammates, and to understand their roles, but to do so within the context of a new language – that of the organization. Helping them “read” the subtext and inferences of these new codes will prevent communication mishaps and promote a cohesive team as well as get that person up to speed quickly.

“I help them learn the language as quickly as possible by debriefing them after each meeting during the first month, and sometimes longer.”

Personnel Manager

In corporate cultures, clarification is the essence of communication. Briefings include detailed descriptions of accountability, measurement, and rewards. Even in this environment, however, leaders will better serve the integration process by following-up to clarify with the new hire. Briefings may include embedded language, clear to the leaders only because they are accustomed to the nuances of their corporate culture. In fact, briefings are like any story: you cannot assume that your message is clear to the listener just because it is clear to you. It is important to discuss the specifics of the briefing with the new member to confirm that your message is understood.

Overall, leaders must be sensitive to how foreign a story packed with organizational cues might sound to a new member. Each workplace tells its stories in unique ways. Leaders who meet with new members regularly to debrief may detect misunderstandings due merely to terminology. These kinds of misunderstandings can derail integration. When they are not resolved, the progress made toward establishing membership is at risk.

Make the New Member Visible Outside the Team

Introductions should not be limited to just the team. Other essential connections include the Board, the clients, and other outside audiences.

Honoring Ambiguity

“What if we could stretch this actor by having them play something that has been totally out of their range before? Oftentimes what I find happens is that the actor makes the leap.”

Molly Smith, Artistic Director, Arena Stage

Ironically, perfect clarity can also be limiting. Role clarification helps individuals understand how their particular talents and skills are valued. However, without some flexibility, the relationships among the team members can become static. “Flexibility allows stronger relationships to build,” as one executive put it. When there is some ambiguity, team members work with a sense of challenge, control and creativity.

Clarity of role is eschewed by one director. “I don’t give them a role,” he said. “I want them to create their own.” This approach demands a high level of competence, confidence, and maturity. It also demands that the manager be ready to support maverick behavior and brilliant innovation. Not every new hire rises to the task of defining his or her own role, but such support invites possibilities.

Learning the Culture

*“The more context you give the person, the greater the probability of success.”
Lina Echeverria, Director, Corning*

At this stage, a sense of familiarity has been achieved between the new member and the team through the selection process, introductions, and efforts to clarify needs, roles and expectations. The new member is now ready to learn the organization’s culture and values.

What does a leader need to do to help a new member feel at ease with the culture? Some found holding regular meetings where everyone worked together useful. With most, however, time for conversation and storytelling surfaced as the common thread. As one executive said, “Tribal wisdom is needed, and it is not covered in training.”

Use Informal Gatherings Where You Are at Your Best

Aside from business meetings, some executives use informal means to help connections occur. This is where an awareness of how one tells stories can have an impact. If leaders know they are at their best in a social situation, for example, they may plan outings for everyone. “I invite the new and old members of the team to my house for dinner, and I do the cooking... It creates a home atmosphere – a place with food, conversation, a safety net.”

Tell Stories That Send a Message

Other leaders recognize that their strength is more in a one-on-one situation. One executive made himself available to the new person as much as four hours a day for two weeks. He felt it ensured faster productivity for the team, and long-term success for the individual.

“You can’t ask me enough questions,” he was often heard to say. This was when he intentionally told stories designed to convey the company’s philosophy. For example, he talked about calling the shift supervisor, not the manager, when the job had to get done – conveying the firm’s traditional, hands-on values.

Assign Mentors As Daily Allies

Another member of the team was often assigned as a mentor for as long as three months to give the new member time to hear stories and ask lots of questions. Mentors were sometimes given specific tasks to do. They were to be available for a certain amount of time, coordinate introductions to key individuals outside the immediate team, describe how the work is done in the organization, and be available to offer advice on any work the new member was about to try. This was particularly important in organizations that had many locations or were located around the world. One respondent felt that mentors worked so well because they were peers.

Praise Actions Consistent with Culture

Leaders need to recognize and reinforce actions that are reflective of the culture during this time. One executive said that this strategy forced her to be attentive to the new person regardless of the pressures around her. She made a point of debriefing all meetings with the new hire during the first month.

Tell Instructive Jokes

Any team or organization experiences problems. To help the person understand these, one director said he tells jokes “about the rough edges.” The jokes give the message that things are not perfect, and they don’t always need to be taken seriously.

Jokes also help the new person relax into the culture. “Thinking is a social process,” explained one of the executives. “As we talk, our knowledge spirals up to greater knowledge and understanding. Joking does the same thing for emotions.”

Stage #3

Gaining Savvy

*“You are all responsible for their [new members’] success.”
Molly Smith, Artistic Director, Arena Stage*

While inclusion and clarification are the foundation of managing integration, they are essentially unapplied. The process pays dividends when the team gets down to work and sees results, and everyone, especially the new member, knows this. Creating doable challenges and team successes early on helps solidify the team.

Stretch, Don’t Break, the New Hire

The first assignment needs to be challenging, but also designed for success. “It should not be one that risks failure, because the new person is ignorant of the culture,” said one executive. He went on to say that the first assignment should afford the person the opportunity to begin to learn the culture. Though ignorant at the start, they should learn something important about the organization during the execution.

Listen For “Nuts and Bolts” Stories

Once the team gets down to work, leaders can gain a sense of integration progress by listening closely to the anecdotes the members tell one another. Interpersonal rapport in a team is one of the most powerful and telling outcomes of working together. The stories that emerge revolve around the nuts and bolts of what needs to get done and how to do it. They reflect the “here and now,” and thus provide immediate feedback on the progress of the team.

Include the Whole Team

*“Integration into the team brings self-confidence to the whole team.”
Michael Orsati, Senior Vice President, Greenwich Capital Markets, Inc*

Enrolling the whole team in helping the new member to learn the social ins and outs of the company is also an important element. Bob Allen, CEO, i.d.e.a.s. at Disney-MGM Studios, reminds his staff during this integration time to treat each other using respect with compassion, within an atmosphere of openness with integrity. He describes it as follows:

Respect is listening deeply (we brought this person on for a reason) with

Compassion to push to solve problems to the benefit of others, in

Openness (no overt or covert secrecy combined with no dogmatic attachment to positions) with

Integrity , bringing honesty plus kind intention combined with courage and responsibility.,

Nourish (Don’t Neglect) the Rest of Your Team

One executive stressed the importance of supporting the current members as well as the new member. She valued the time she invested in her senior managers, no matter how much they knew the ropes. Change impacts people differently, and she knew that they wanted her support during this time.

Assign Each Member A Vital Integrative Role

Savvy leaders assign each member a specific role to play in the integration. This allows individuals to identify their personal stake in the process, and keeps the whole team involved and informed. The assignments can range from mentoring to taking the lead on teaching specific procedures to working on a project or product together.

Model the Message

A number of the executives pointed to the value of modeling during this stage, especially in terms of vulnerability. Leaders need to allow their imperfections to show, as this enables the new member to feel comfortable. This can also help to solidify the team.

One CEO reported that when he modeled vulnerability as an acceptable behavior, problems surfaced, were identified, and resolved through group interactions. Because of his willingness to take a chance, others were able to understand his message and take risks that may have been missed had he simply facilitated a discussion.

Stage #4

Up to Speed Integration Complete

“You watch the pulse of the team, how things are going, like flying a kite. You want to feel the ‘tension on the string’.”

Lina Echeverria, Director, Corning

Look for Clues to Integrative Success

Where the first three stages of the model address the process of managing integration, this stage describes how to identify its completion. This is important, as there comes a point when the new member is incorporated, the team is in full swing, and leadership needs to step back. How does the leader know when the process is complete? There are many signals to look for:

Trust

“When the team is really working together,” reflected a college president, “I notice that they begin to discuss possible actions rather than reporting on current actions in team meetings.” She felt that when people are ready to talk about the ‘maybe’ stuff, they were showing their own vulnerability to each other – a sure sign of trust.

Decisiveness

A principal of a school felt the team was functioning at full steam again when “There (was) no holding back on decisions. No deferred decisions. No inconsistent decisions.”

Commitment

Another director looks for evidence that the team members are committed to the bigger picture. “I know they are working together again when they do not put the team’s goals at risk while achieving their own.”

Self-Confidence

“The new person begins to talk with self-confidence,” said one executive. Another executive said when the new person can tell a joke in the language of the company, he knows they are full members of the team. “She tells jokes in the language of the clan in meetings,” he said, “And she pushes back on my ideas.”

Ready to Mentor

When leaders can identify these signs, they know the new member is fully integrated and is ready to switch roles and be available to mentor to a new arrival.

What it Takes to Successfully Integrate a New Member Into a Team

“Storytelling is the secret.”

Bob Allen, CEO, i.d.e.a.s. at Disney-MGM Studios

Our model is based on proven, practical techniques used by the executives we interviewed. In addition to specific techniques (presented above), the interviewees revealed overall strategies that contribute to a smooth and productive integration.

Take a personal approach

Executives who spoke about and appreciated their personal experience joining a team had a strategy that worked. Those who did not sympathize with the outsider coming in did not recognize the bottom line value of managing the integrative process.

Learn over time

Everyone had many experiences of welcoming new staff, and they all agreed that it takes multiple trial balloons to discover what works. Those who felt confident in managing the process of integration had made a conscious effort to develop their winning strategies.

Include the culture in conversations

It is important to maintain a sharp awareness of the corporate culture. Executives agreed that they needed to be spontaneous with insights and forthcoming with details when it came to a culture's impact on the team, the work, and expectations.

Choose strategies to fit the big picture

Executives also recognized the need for strategies to be part of the culture and context. They were acutely aware of the behavioral norms in which they operated, and knew that the norms reflected the context in which the integration was managed.

Capitalize on the tactical impact of stories

As we said in the beginning of this article, one strategy appeared again and again: using the power of story. All the executives used stories to help the new members learn about the work and the culture at a deeper level. This helped support the smooth integration of the new member.

Conclusion

Like Alexander the Great, top executives must learn to manage the constant flux within their teams. Without an awareness of and strategy for the complexity of bringing in a new member, even the best teams can find their productivity undermined on a daily basis. That said, today's CEO can, with reflection and skill, effectively transform into an opportunity the disruption of this modern phenomenon of frequent turnovers. The necessary steps to assure that quick, solid acceptance and learning will lead to successful integration and productivity can be anticipated, planned for, and implemented. You can do this just as well as the King of Macedonia.