



New Leader Assimilation Workshop

Why do this?

This workshop is a fantastic early step for a leader who is new to an organization or new to a team. It helps everyone gain understanding and get questions answered that would otherwise take far longer to answer in the normal course of business. It also enriches individual and team relationships. All of this can lead to a marked improvement in overall productivity.

How long does it take?

Plan for 3-4 hours for a team of 5-10. This can be done virtually or in person.

What are the steps?

Step 1: Leader Answers Questions as Pre-Work

- Give the Leader “Pre-Work Questions for the Leader” so they can be prepared.

Step 2: Facilitator Guides the Team to Answer “Questions for the Team to Answer” (about 1 hour)

Note: The leader is not in the room at this point.

- Guide the team to answer “Questions for the Team to Answer” (on the following page).
- You may want to write their answers on large flip charts around the room or virtually.
- Give the team a break while you meet with the Leader (Step 3).

Step 3: Facilitator Gives the Leader an Initial Reveal (30 minutes to 1 hour)

- Give the Leader an idea of where the most passion is, and where most of the discussion will likely be. Your goal is to help the Leader to feel prepared. At the same time, be sure to protect individuals’ identities when relaying concerns and opinions. This is critical for trust.

Step 4: Time to Share! (about 1.5 to 2 hours)

- With the Leader and Team together, share the team’s feedback from “Questions for the Team to Answer.” The Leader should answer any questions the team offers.
- The Leader then shares answers from the pre-work questions that were not already covered in conversation.
- Allow the Team and the Leader to ask any further questions of one another.

When possible, it’s a great idea to schedule a social outing after this workshop. Capitalize on this bonding experience!

Questions for the Team to Answer

About the Leader...

1. What do we already know about the Leader? And what would we like to know?
2. What concerns do we have about this Leader in this role?

About the Team...

3. What does the Leader need to know about us as a Team?
4. What Team norms exist? How do we handle accountability? How do we handle conflict? What should be different here?
5. What norms exist in the way we schedule and run meetings?
6. What behaviors are rewarded and recognized on the Team? Should this be different in any way?

About the Environment...

7. What are the most important things the Leader needs to focus on in the next:
1-3 months?
3-6 months?
6-12 months?
8. What recommendations does the Team have for meeting these challenges?
9. What would you like to see done that is innovative or different?
10. Add specific questions that focus on your organization's Mission, Vision, Values, and your Team's Goals.
11. What advice would you offer the Leader as he or she steps into this role?

Pre-Work Questions for the Leader

Personal

1. What brought you to this role?
2. What are some of your professional goals? How about personal goals?
3. How do you describe your leadership style? How do others describe your leadership style?
4. What motivates you?
5. What are some communication preferences you have? How do you prefer to receive feedback?
6. How will your team know when you're stressed? How do you manage your stress?
7. What are some of your pet peeves?

Organizational and Team

8. What are your expectations for the team?
9. What is your future vision for the team and/or organization?
10. What are the top priorities you see for the next 3 months? 6 months? 1 year?

Would you like help facilitating a New Manager Assimilation Workshop?
Reach out to pas@ConvergeCoachConsult.com. Happy to help!