[Insert Your Organization Name or Logo Here]

CEO Onboarding Strategies

**Introduction**

The board’s succession work is not finished with the hiring of the new CEO. Successful boards pave the way for the new CEO by including an “onboarding” program as an integral part of their succession planning.

Onboarding a new CEO should not be confused with orientation for new hires. Unlike an orientation program, onboarding is a process that spans the first critical months, or better yet, the first year of the new CEO’s tenure with the organization. A well-designed onboarding process can contribute to the CEO’s quick adaptation to the organization and sets the stage for leadership success. It is one of the best tools the board has to establish the leadership of the new CEO, and assist him or her to rapidly resume the pace of work needed to advance the organization toward its vision.

The steps that follow outline the various components of a comprehensive onboarding program. For each step, a member of the board or executive team should be identified to ensure that component of the work is accomplished. The Appendices following this outline contain templates for planning the various steps to ensure a well-organized introduction and leadership transition for [organization name’s] new CEO.

1. **Set Performance Expectations**

Using the template in **Appendix A**, identify the board’s first year expectations for the new CEO. Identify clear, realistic goals, measures, and milestones. The board chair should review these with the new CEO during an initial meeting.

**Accountability: (Name)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, (Board Chair or Board Compensation Committee Chair)**

1. **Map the Organization’s Culture**
2. Assemble electronic files of key documents, such as the strategic plan, financial documents (financial reports, statements, audits, etc.), quality reports, Form 990, community health needs assessment, annual reports, and board minutes.

Using the template in **Appendix B**, task a senior executive and the CEO’s executive assistant with the responsibility of ensuring key documents are assembled in well-organized, accessible electronic files. Provide print copies of published documents if relevant.

**Accountability: (Name)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, (a member of the executive team)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, (executive assistant to the CEO)**

1. Using the template in **Appendix C**, schedule briefings with the executive team and senior management to review functional and programmatic areas, service lines, subsidiary organizations, etc.

Ensure that problem areas, issues and concerns are shared with the new CEO. This should be done in an objective manner and include proposed solutions, alternatives and action plans that are either under consideration or implementation to address, improve or resolve the issues.

**Accountability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (a member of the executive team)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, (executive assistant to the CEO)**

1. **“Navigational Support”**

Using the template in **Appendix D**, identify which senior executives can take some day-to-day work off the new CEO’s plate to allow time for the CEO to meet/greet and get acclimated. Determine what specific work they will assume and for how long. Ensure this information is communicated and redirect individuals to these individuals as appropriate.

**Accountability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (a member of the executive team)**

1. **Identify Stakeholders and Influential Colleagues, Identify Formal and Informal Networks**

An official introduction of the CEO to the organization and the community sets the stage for acceptance and support of the new leader. Make plans for introducing the CEO to stakeholders and influential colleagues. Identify which board member or executive team member is best positioned to make the introduction. Make the introduction more than a handshake. Ahead of time, offer the CEO insights to alliances and networks (formal and unwritten), provide history and put relationships into context.

Using the template in **Appendix E**, list stakeholders and colleagues the CEO should know of and/or be introduced to. Identify which board member or executive might be best positioned to make an introduction and at what opportunity.

**Accountability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. **Identify a Transition Coach (External Coach, Board Member, Other Executive) and or Committee**

The role of a transition coach, if the board elects to hire one, is to assist the new CEO, the board, executive team and organization make a successful transition to new leadership.

Identifying a well-respected and knowledgeable board member or member of the executive team as a resource can help deepen the CEO’s early knowledge and understanding of the organization’s environment, challenges and opportunities.

**Accountability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, Board Chair**

**Transition coach:** Yes/No

If yes, Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Board member to act as CEO resource: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. **Communicate**

Continuous communication is essential to establishing a trusted working relationship between the board and the CEO. Frequent discussions help to ensure clarity and well aligned expectations between the board and CEO. Staying attuned to the CEO’s acclimation to the organization includes asking:

* Are the new CEO’s expectations being met?
* What unforeseen barriers or challenges are being encountered?
* How can the board provide support, consultation or direction?

1. **60 or 90-day review (informal)**

**Accountability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, Board Chair**

1. **Six month review (formal)**

**Accountability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, Board Chair**

**APPENDIX A**

**Performance Goals**

|  |  |  |
| --- | --- | --- |
| **GOAL** | **MEASURE** | **MILESTONES** |
| 1. Financial Goal(s) |  |  |
| 1. Quality Goal(s) |  |  |
| 1. People/Workforce Goal(s) |  |  |
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**APPENDIX B**

**Key Documents Checklist**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Document** | **Location** | **Document Owner** |
| **Organizational Charts** | | | |
|  | Organizational Chart |  |  |
|  | Board Chart |  |  |
|  |  |  |  |
| **Balanced Scorecard** | | | |
|  | Financial Scorecard |  |  |
|  | Quality Scorecard |  |  |
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| **Strategic Plan** | | | |
|  | Strategic plan |  |  |
|  | Implementation/action plans |  |  |
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|  |  |  |  |
| **Financial** | | | |
|  | Financial reports |  |  |
|  | Audited financial statements |  |  |
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| **Quality and Patient Safety** | | | |
|  | Quality reports |  |  |
|  | Accreditation reports |  |  |
|  | Any process improvement or corrective action plans |  |  |
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| **Compliance Reports** | | | |
|  | Compliance Plan |  |  |
|  | Form 990 Filing |  |  |
|  | Community Health Needs Assessment |  |  |
|  | Annual Reports |  |  |
|  | Corrective Action Plans |  |  |
|  |  |  |  |
|  |  |  |  |
| **Governance Documents** | | | |
|  | Roster of board members & contact information |  |  |
|  | Schedule of board and board committee meetings |  |  |
|  | Bylaws |  |  |
|  | Committee Charters |  |  |
|  | Board minutes for the previous 12 months |  |  |
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| **Add Additional Documents as Relevant and Needed** | | | |
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**APPENDIX C**

**Briefings with Executive Team and Senior Management**

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| --- | --- | --- | --- | --- |
| **Individual** | **Title** | **Responsibilities** | **Date & Time** | **Location** |
| Name | Title |  |  |  |
| Name | Title |  |  |  |
| Name | Title |  |  |  |
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**APPENDIX D**

**Transitional Support**

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| --- | --- | --- |
| **Individual** | **Work Assumed** | **Target Date of Transition Back to CEO** |
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**APPENDIX E**

**Identification and Introduction to**

**Key Stakeholders and Influential Colleagues**

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| --- | --- | --- | --- | --- |
| **Individual** | **Title** | **Organization** | **Board Member/Executive to Make Introduction** | **At What Opportunity (e.g., organized meeting, lunch, appointment)** |
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