

### ***Briefing Notes:***

## **Preparing for a Briefing Meeting with a New Leader**

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The following notes are suggestions for current staff that are thinking through how to best relate to a new leader during the period before and immediately after his/her arrival.

1. Prepare for each encounter by thinking about the issues from the new leader's point of view. Being a new leader is like tag-team wrestling. The new leader stays on the mat while a cast of thousands cycle through to work him/her over on their narrow issue. Therefore, in order to be effective, a follower needs to:
  - ◆ Take into account the myriad key stakeholders who want something from the new leader, especially key outsiders and the leader's boss or board. Where do your issues fit within the overall priorities? Who and what are your competitors for the leader's scarce attention. (Davenport & Beck, 2000)
  - ◆ Integrate the issue with other related items, especially issues for which you are not necessarily responsible.
  - ◆ Think about how to absorb some of the complexity surrounding the issue (by good conceptual thinking and by effective staffing).
  - ◆ Suggest the next steps and how someone other than the leader can take them while still having the new leader's views shape the issue.
2. Reframe your insider, historical knowledge in ways that extract relevant lessons for the leader's future initiatives, so that he/she thinks of your tenure as an asset rather than a liability.
3. Think ahead of time about what you have learned thus far in terms of how the leader likes to be supported—e.g., paper or verbal, long or short, options or one best recommendation, hard versus soft data, etc.—and have that intelligence shape your approach. (Gabarro & Kotter, 1993)

In the encounter, be sensitive to both process and outcome. The most effective mode of influence is inquiry rather than advocacy. (Shell & Moussa, 2007) Think of the guidance that you need. Think of questions that will draw the leader out and help him/her come to know his/her own mind on an issue. Engage with the substance by thinking together, generating options, thinking about criteria for effective strategies versus advocating a single option.

4. Take the risk of speaking “truth to power.” Leaders are aware of the difficulties that many people have in giving straight information. New leaders are particularly aware of their dependency on relative strangers to give them honest appraisals in ways that are connected to helping them move forward, especially relative to key agendas.
5. In closing the encounter, explicitly ask for feedback while acknowledging that many features of the infrastructure and support systems have taken their shape from the previous leader’s preferences. The more explicit feedback the leader can give on how he/she likes to be supported and what he/she does not like, the faster the systems can evolve toward his/her preferences.
6. Think developmentally and be aware of overloading the new leader. The early aim is to build an effective working alliance with the capacity to address the myriad current and future issues. Select only a few vital issues that are substantively critical and good exemplars of working out one’s relationship.

## References

- Davenport, Thomas H., and John C. Beck. *Getting the Attention You Need*. Harvard Business Review. Vol. 78, Vol. 5, September-October 2000: p. 119 - 126.
- Gabarro, John J., and Kotter, John P. *Managing Your Boss*. Harvard Business Review, May – June, 1993, pp. 150 – 157.
- Shell, G. Richard and Mario Moussa. *The Art of Woo: Using Strategic Persuasion to Sell Your Ideas*. New York: Penguin Portfolio, 2007.

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