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# FROM TRANSACTION TO TRANSITION: PART 3 - USING LEADERSHIP TRANSITIONS TO STRENGTHEN CULTURE

In the previous two installments in this series ([Part 1](#) and [Part 2](#)), we shared insights about the strategic and organizational implications of leadership transition within healthcare. Our central thesis — do not treat the move from one leader to another as a simple transaction, but instead, apply a thoughtful transition process to better prepare the organization and the incoming leader for success. We also explored how a Transition Committee can be instrumental in identifying and capitalizing on the strategic, organizational, and cultural opportunities that can surface in an intentional approach to transition.



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This third installment focuses on how leadership transitions can advance an organization’s culture. We close by presenting a framework to help organize what we believe are the central elements of a successful leadership transition roadmap.

First, a brief aside: the term “culture” is in the running for most variably defined, widely applied, and thus least meaningful words in modern discourse. For this article, we would like to advance the simple definition of culture as “the way we do things around here.” More specifically, we understand culture as the often unspoken or undocumented agreements about how people come together to advance work.

We view practices as the building blocks of culture. Practices include the behaviors needed to fuel a desired culture, as well as the supports needed to make those behaviors as easy as possible to do. For example, let’s consider a leadership team preparing to welcome a new CEO. You might assess how that team interacts with each other behaviorally to get their work done, including the meeting cycle, group norms, or other mechanisms that support those behaviors. Consider the following example of behavioral polarities related to how a team may prefer to function:

<b>We iterate many versions and get input.</b>	↔	<b>We expect complete deliverables.</b>
<b>Have a question? Write an email.</b>	↔	<b>Have a question? Call me.</b>
<b>I need more detail.</b>	↔	<b>Just tell me the bottom line.</b>
<b>How was your weekend?</b>	↔	<b>Let’s get to work.</b>
<b>Just figure it out.</b>	↔	<b>Let’s talk about what I need.</b>
<b>We inform managers when the work is done</b>	↔	<b>We cc managers all along the way.</b>

These cultural norms are often unspoken—perhaps those who are living them are even unaware of them—and can frequently be experienced as puzzling or taboo to incoming leaders. Understanding these norms and how, for better or for worse, they impact performance can serve as the starting point for positive cultural adaptation.

The occasion of leadership transition can advance culture in two key ways: (1) codifying culture for an incoming leader can help organizations learn about and thus evolve their own culture and (2) by opening a conversation about working norms, organizations can let in good ideas from incoming leaders more easily.

Learning these working norms through trial and error is, at best, a big investment in time and, at worst, a significant professional risk for incoming leaders.

What if, instead of making a new leader learn these norms for themselves, a Transition Committee (or some similar group) identified the top ten things anyone should know about your culture before the start date of that new leader? This achieves two goals by:

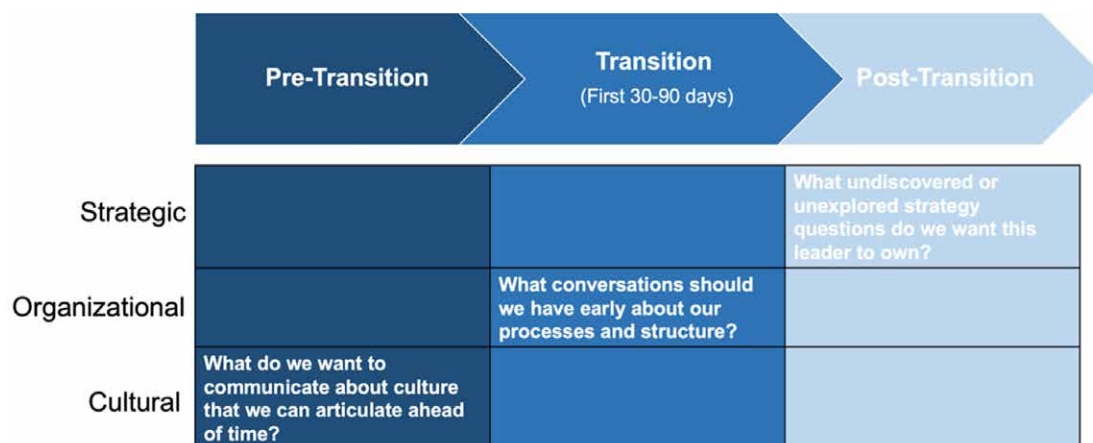
- 1. Speeding up the leader's ability to be effective in the system:** "I like that my new leadership team wants to get right to work, but I worry that we don't know each other well enough personally to establish the trust we need to be high performing."
- 2. Enabling the organization to better understand itself, and in the process of building that understanding, it may find issues it can now seek to evolve:** "Interesting—we're a culture that cares about details, but people don't feel trusted to get things done without being checked on all the time. Is that helping us?"

The reality is there are all kinds of cultural norms. Some are solid and beloved, while others are new and promising. Still others are sticky and unhelpful. Incoming leaders who clearly understand which ones are which will know where to adopt, reinforce, or disrupt, respectively. We have seen organizations take on this work in both big and small ways. From the example of the "top ten list" mentioned earlier to internal assessments and broader approaches to transforming organizational culture.

Consider the work that one outgoing health system CEO advanced to conduct an organizational assessment as a gift to his successor. This CEO recognized that certain cultural issues could be addressed in the short term, but that many more would really need to be informed by the next leader. This work helped accelerate the new CEO's onboarding and provided her with a useful jumping-off point to tackle critical issues that would have otherwise bubbled unhelpfully under the surface.

Another retiring leader of an academic medical center faced issues of toxic culture that she worried would significantly impair her successor's entry and effectiveness. This leader prepared for and announced work to broadly engage the organization in the creation of an aspirational culture, working in partnership with the incoming leader who would actually launch and lead the effort. It was one of the most effective handoffs we have seen for using the transition process to ensure that both leaders were aligned and could demonstrate their commitment to addressing a major challenge, while catalyzing the promise of a brighter future that all could embrace.

Across this series, we have discussed several important considerations as you shift from a "transaction" to a "transition" mindset. We favor the application of the framework below:



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This framework can be completed in a variety of ways to inform the development of an onboarding and transition roadmap that includes:

- **Pre-Transition:** Early issues that can be tackled before the new leader arrives
- **Transition:** Onboarding activities and issues to explore during the transition itself (first 30-90 days)
- **Post-Transition:** Issues to intentionally leave unresolved, but with some groundwork to offer the new leader some context

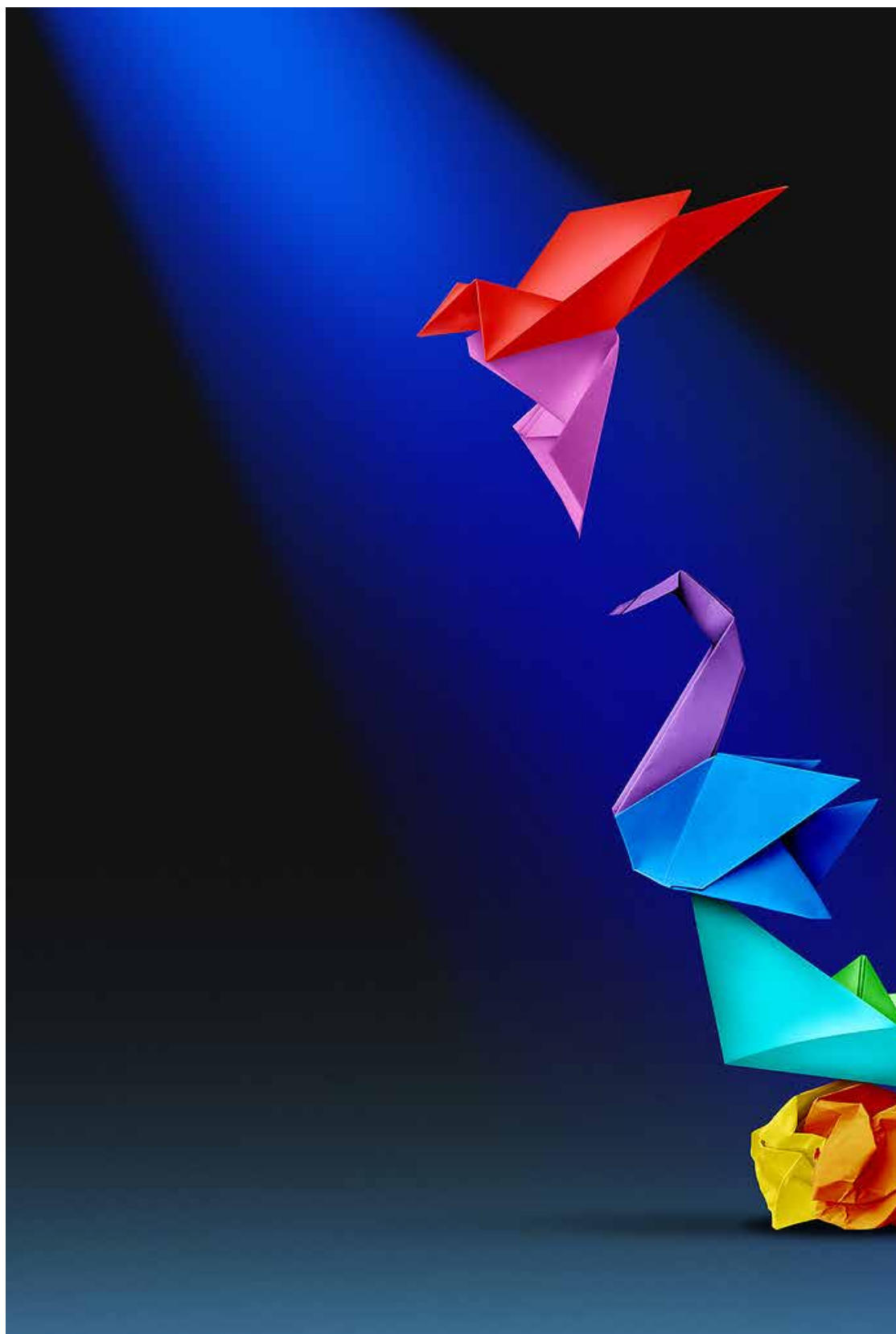
One way to apply this framework could be to invite Transition Committee members individually, in dyads or small groups, to work on different rows (strategic, organizational, cultural) to populate each box. They could complete it independently and/or speak with key leaders and staff to better inform the details and texture of the issues at play through well-facilitated brainstorming sessions or focus groups.

The end goal of any transition is the successful conclusion of the transition. Leaders can be better prepared to lead change, manage performance, and integrate when fully onboarded. Simple leadership transaction rarely achieves these ends, or at least not smoothly. True leadership transition helps new leaders and the organization around them evolve and thrive.

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