



# Leadership Transitions

## SEVEN STEPS TO ENSURE SUCCESS

**BY PATRICK J. McKENNA.** There is no definitive answer to the question of exactly how long an outgoing leader should stay in office after announcing his or her departure. However, contrary to the advice of some who advocate passing the reins immediately to avoid lame-duck syndrome or firm drift, one-on-one interviews with dozens of law firm leaders have revealed a distinctly different conclusion: The consensus among them is that an effective transition generally takes three months' time.

**A** critical reason for taking this kind of time is that the accumulated wisdom of the incumbent is incredibly valuable during a transition, and it's the kind of wisdom that cannot be conveyed in a matter of mere days. The outgoing leader has unique insights to provide on everything from the expectations of certain power partners, to specific practice area problems the successor will have

to address, to the idiosyncratic attitudes of various staff members.

During the transition period, a continuous dialogue between the departing and incoming leaders is critical to building the foundation on which the successor can best begin his or her tenure. Here are particular action steps the two leaders should put their heads together to address.



## **1** Join Together in Finding a Comfortable Way to Let the Incumbent Step Down

Regardless of whether the incumbent is stepping down under good or bad circumstances, the news needs to be conveyed to the world in a positive way—something the outgoing leader and the incoming leader need to get clear on together. The departing leader should compose a 30-second “elevator speech” to tell people in an upbeat way why the move is being made and to convey excitement about the future of the firm. The incoming leader needs to stay on point with the same message. Both need to cast each other and the firm in the most positive light.

## **2** Set Sensible Guidelines for Respecting the Other’s Position

There’s just no getting around the fact—departing leaders are invariably asked what they think of

their successors. People always want an “inside scoop” on a new leader’s approach, character and personality—but be wary, and remember it’s a two-way street. Neither leader can afford to make the mistake of accepting an invitation to complain about the other’s possible weaknesses—either during the transition period or after the reins are officially passed. Mutually agree, in advance, to forgive any shortcomings that might be noticed and not to badmouth each other.

## **3** Clear the Deck of Long-Delayed Issues

A leadership transition is a good time to deal with those protracted but annoying problems that have somehow fallen by the wayside in the press of other to-dos. In other words, for both the outgoing and incoming leaders, this is an opportunity to address long-delayed operational

situations or troublesome personalities. Rectifying such problems before the incumbent steps down helps the new leader come in with a cleaner plate and begin to address more important and strategic issues sooner.

## **4** Identify Where Early Wins Can Be Secured To Build Momentum

Departing leaders should ask themselves this question: What information would *you* want at close proximity if you were now about to embark on accepting the leadership position at this particular firm? All kinds of detailed information about critical management tasks and deadlines will come to mind. But the incumbent’s potential for being of immeasurable assistance goes well beyond just administrative minutia. Outgoing leaders should strive to help their successors identify areas that offer the best opportunity for quick success, while also highlighting potential pitfalls or areas of contention.

## **5** Work to Get Sensitive Peers on Board

While outgoing leaders need to openly support their successors, often they also need to find a way to make a specific endorsement with “sensitive” peers. In fact, one of the most important tasks an outgoing leader can assume is to talk one-on-one with those of the partners who may feel the most adversely affected by having a new leader. These may be partners who are disappointed that they weren’t considered for the role; partners who were in a favored position with the outgoing administration and may feel threatened because of the change; and any partner whom for whatever reason may feel dis-

appointment with this candidate taking over the firm's reins. Outgoing leaders have to use their influence with each of these partners to encourage them to work with the successor for the good of the firm. Buy-in from all the firm's

stakeholders is critical to the transition.

## **6** Establish a Mutual Understanding About What Will Happen at the End of the Transition

A successful leadership transition re-

quires a clear definition of roles and the predecessor's willingness to let his or her successor lead the firm unimpeded. The primary role for outgoing leaders in the final days is not to become obsessed with how colleagues see them or what they think their legacy will be—their primary role now is to help the new leader succeed. Accordingly, the outgoing leader must agree to allow the incoming leader to run with things, even when they might be in stark contrast with one of his or her previous initiatives, or convey a complete change in the firm's strategic direction. Incoming leaders need to ask their predecessors to be sensitive to the influence they still have and the ways they can inadvertently undermine efforts. This may mean gently reminding the predecessor that changing times sometimes require changing approaches.

## **7** Have a Symbolic Show of Support

Last but not least, symbolism and ritual are a powerful way to communicate a positive handoff of the leadership reins. In the case of one prominent firm, the outgoing chair staged a somewhat humorous but effective ceremony, where he literally passed a baton engraved with the firm's name into the new leader's hands. Such fairly simple gestures or ceremonies help everyone deal with their feelings, while bringing the departing leader's tenure to a psychological conclusion and opening people's minds to new possibilities. LP

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# SELF-ASSESSMENT FOR INCOMING MANAGING PARTNERS

For new firm leaders, a transition period of a couple of months is absolutely necessary to think through all the myriad details that need to be attended to before assuming office. There are numerous activities that need attention during the period from when you are first elected (or selected) to your first official day in office—ranging from preparing your family for the huge time sacrifice that's about to occur to determining how to transition some (or most) of your personal practice and the inherent client relationships.

However, it's also important to really get to know your strengths and weaknesses in becoming firm leader. Doing some pertinent self-discovery through a personal assessment instrument can help you better understand your unique strengths and how you react under stress. Ideally, this gets done *before* assuming office, not after you've been dropped into a quick sink-or-swim situation.

Here are the types of questions that new law firm leaders are often most concerned about:

- Am I really clear on the reasons I accepted this position?
- How can I be sure that I have correctly understood what is expected of me?
- Which tasks should be a priority and which can be put on hold?
- Have I defined the challenges facing my firm and determined an approach to dealing with them?
- When can I begin to introduce change and what is my initial plan of action?
- How do I make sure that I have the support I need from the partnership?
- Who am I going to meet with first and what am I going to say?

Methodically answering these types of questions helps new managing partners get ready-set-and-go for their first days on the job.

—Patrick J. McKenna