

# I'm the New Head of HR, Now What? The First 90 Days Senior HR Transitions

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**DAVE ULRICH, NORM SMALLWOOD, AND JON YOUNGER**



# I'm the New Head of HR, Now What?

## The First 90 Days (Senior HR Transitions)



Dave Ulrich and Norm Smallwood

**S**o, you just got the top HR job. Congratulations!

Your business leader has said the right things. He wants a partner who will contribute to business success. He needs someone who will help build talent and organization for the future. He wants to deliver on aggressive financial and customer goals with a bold strategy that he knows will be difficult to execute. He is open to your ideas.

*Now that the dog has caught the car, what questions and actions should drive your first 90 days?*

### 1. DO I REALLY KNOW THE BUSINESS?

Business knowledge requires the basics of mastering the income statement and balance sheet, reviewing the business strategy, and understanding industry dynamics. The MBA basics allow you to then deep dive into the specifics of how the business works.

#### a. Do I know how we make money?

Each business has a unique formula for making money. You need to learn who customers are and why they pay your firm for products or services. You may want to do a process map of creating products/services through customer payment for those products through disbursement of that cash. This cash flow map helps you recognize how your company makes money and provides value to your customers. This cash flow map may come from discussions with finance and marketing colleagues. They may be surprised that your conversation with them focuses on cash more than people, but it is imperative to learn the business. You may also look at recent presentations given at the Board of Directors or other senior management meetings where industry and firm overviews are regularly scheduled. Getting acquainted with the person or people who prepare these presentations (often in strategy roles) is a good source of business insight.

#### b. Do I see how the business operates from multiple points of view?

Different stakeholders have different views of what business is about. In the first three months, you have the luxury of asking the naïve but interested questions that help you

understand their perspectives. These 30- to 60-minute meetings not only inform you about how the business operates, but informs them about what insights you might offer. By the questions you ask, you set a contract for how you deliver value to them.

- i. Talk to senior line managers about the business, their goals, their experiences with HR, and about how people and organization can help them deliver their goals.
- ii. Talk to CFO's about the financial requirements for success. Find out about the market value of the firm, particularly intangibles, and how investors perceive the firm's current intangible value. Learn the financial metrics that matter most in this company and ask them to help put HR investments in these terms.
- iii. Talk to customers about how your organization does relative to competitors. What are their buying criteria? What do they want more or less of from your firm? What is your firm's current and desired reputation (or brand)? How could they participate in designing innovative HR practices to deliver on the brand they desire?
- iv. Talk to analysts and investors who value your firm in the public marketplace (or headquarters if you are in a region or business). Find out what they look for in valuing your firm, how your firm ranks with competitors on intangibles, and what would have to happen to increase their confidence in you.

Some of these early meetings may surprise people. These meetings are not designed to learn about what to teach on Day 3 of your one-week leadership program; they are designed to help you build relationship equity with key stakeholders. They are also meant to help you learn the business from a business point of view.

#### c. Do I have first-hand experience with the product/service?

Sometimes, when new to a company we don't know the products or services. It is useful to act like a customer or user and see how the product/service works. Buy the product, use the service, choose among competitor products or services. See your organization through the eyes of the customer.

#### **d. Do I have relationships with key people?**

Get to know the people you will be working with. Find out about their goals and objectives so that you can work with them. Spend some private time with key colleagues. In these informal discussions find out answers to some of the questions:

- i. Why did I get the job? What are the strengths I bring that you want me to deliver?
- ii. What are some of the unique strengths and weaknesses of the organization that I should know about?
- iii. What are the land mines that I should be aware of to avoid?
- iv. What executive style works and what does not work here?

Let others be your mentors and coaches as you try to find your way around the organization. In these conversations, also share your views of what you think of HR. Be aware that their expectations of you may not be consistent with your expectations because they have not seen what you offer.

#### **e. Do I make the business the focus of my formal presentations and information discussions?**

Talk about the business. In your meetings with HR professionals, begin with business updates. Send the message that you are concerned about the business...use financial, customer, and strategic information to kick off your HR presentations.

### **2. DO I HAVE A BROAD MAP OF THE HR ACTIVITIES BEING DONE?**

Every company is doing HR work. Find out what is being done by mapping it. Summarize and synthesize the work being done with a grid of businesses (columns) by HR activities in people, performance, communication, and work (rows). Look at the grid to see where HR investments are innovative, aligned, and integrated. Try to assess the overall quality of HR work within the organization. Where are the pockets of excellence? Where are the areas of concern?

#### **a. Can I get a quick overview of what HR work has been done?**

- i. What has worked well?
- ii. What has not worked well?
- iii. What can I learn from a grid of HR activity vs. business?

#### **b. What HR work is innovative and could be considered best in class?**

#### **c. What HR work is aligned with business goals and helps drive where the business is going?**

#### **d. How integrated is the HR work? Are the staffing, training, rewards, and other systems driven by common competencies and capabilities?**

### **3. DO I HAVE A SENSE OF THE KEY HR PRIORITIES?**

An easy and common mistake is trying to be all things to all people. In study after study, leaders need to synthesize and prioritize. In your first few observations of your company you will probably find many things that could be improved. List them. Think about them. Prioritize them. If you have 10 projects and 100 units of resources, the wrong allocation is 10 units per project. You need to focus your time and HR investments on those initiatives that will be both implementable (doable within time and budget) and have impact (make a visible difference in business results).

#### **a. Are there some early wins?**

Are there some obvious areas where you can improve? Sometimes people who live in a house don't see the dirt or clutter that they created. With a fresh eye, you can see the clutter and probably figure out what to work on first to make a difference. Be willing to find the early wins and do them, fast.

#### **b. What will be the two to four HR priorities that I can commit to delivering?**

HR strategy is built around the outcomes of doing good HR work. These outcomes are the capabilities a company needs to deliver on its strategy. As you move into your role, be constantly doing organization diagnoses to figure out which capabilities (talent, speed, leadership, innovation, service, efficiency, collaboration, learning, accountability, culture) your organization needs to deliver on strategies. Focus on these capabilities. Get management agreement on them. Make them the outcomes of your HR strategy. Measure them and track them. Build 90 day plans to deliver them.

- i. Are the key priorities or capabilities signed off by the management team?
- ii. Are there metrics to track them?
- iii. Will they be clearly linked to business results?

### **4. DO I HAVE AN HR TEAM IN PLACE?**

#### **a. Do I have my direct reports in place?**

- i. Are there any snipers who would have liked my job and cannot get over it?
- ii. Do I need to change anyone who is clearly not credible and my not moving them hurts my credibility?

One of your first tests of leadership is the team you have in place. Sometimes, business leaders watch to see if you can make the hard calls on your team to trust you with helping them make the tough calls in their business. When one new HR executive told his senior line leader that he needs to change people, the line executive said, "We knew this a long time ago and wondered if you would see if and how you

would act. Now, the issue is if you are really a leader for this company by doing what has to be done." Getting your team in place may mean disappointing some people, identifying discontents who are not pleased with your direction or style, and building a team of cohorts you can trust and work with.

**b. Have I assessed the ability of HR people?**

- i. Are they credible activists?
- ii. Do they know the business?
- iii. Do they help drive strategy, change, and culture?
- iv. Are they competent in HR practices?
- v. Do they do the basics well?

In addition, your extended HR staff will look to you for guidance. Often HR professionals are last on the development-investment list. As you state a new direction for HR and when you support that direction with actual resources and support, your HR staff will learn that you are serious about your agenda.

**c. Am I investing in my HR staff ?**

- i. Am I clear about what I expect from the HR staff?
- ii. Can I help them see where we are going and the excitement for the future?

Your investments in HR should be based on a theory or point of view about what makes a successful HR professional. This should be based on what knowledge, skills, and abilities HR people need to drive business success but translated to specific behaviors.

**5. HAVE I DEMONSTRATED MY STYLE IN THE TRANSITION?**

Your personal behavior in the transition will communicate who you are and what you value. There are a number of behaviors that become magnified under the less of transition.

**a. Do I honor my predecessor, but set a new agenda?**

How you treat your predecessors communicates your values and sensitivity. Often, you are brought in to change a direction, but you need to build on the past, not trash or destroy it. Taking counsel from your predecessor (or at least listening to him/her), finding positive things to say about his/her tenure, and then creating your own agenda are tricky transition steps. Building on the past and creating a new future are better messages than undoing the past and redeeming the future.

You may manage symbols to signal a new agenda, e.g., physical layout of office and office assignments, timing of meetings, decision making style, etc.

**b. How am I spending my time and energy?**

You may also need to pay particular attention to where you focus your energy as reflected by your calendar in the first 90 days. Who do you meet with? Where do you meet them? What questions do you ask of others? It is important to signal a new beginning if warranted (e.g., missing this meeting is unacceptable or this approach to work will not work). If your calendar does not reflect your message, you will not communicate your message clearly.

**c. Am I raising the bar on HR?**

You can also set new standards for the HR community by talking about metrics and accountabilities and tracking things that may be new and/or different. Stating new expectations and then demonstrating commitment to those expectations comes as you define new metrics and hold people accountable to those metrics.

**d. Am I setting the right norms and managing symbols?**

Your people will watch closely your early signals ... attitude, approach, style, timing, etc. to get a sense of how you will manage the department. What meetings are you holding? Who attends? How are they run? How will you govern? What are the symbols you are creating, e.g., your office space, logos, and other changes you make?

**CONCLUSION**

As a new leader, you are in a unique opportunity to shape a new agenda for the HR department. The first 90 days often communicates that agenda by your words and deeds. When you go into the job with a clear understanding of the agenda you want and how you want to go about installing it, you will increase your chances of success.

# About the Authors

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Dave has consulted and done research with over half of the Fortune 200. Dave was the editor of the *Human Resource Management Journal* 1990 to 1999, has served on the editorial board of four other journals, is on the Board of Directors for Herman Miller, is a Fellow in the National Academy of Human Resources, and is cofounder of the Michigan Human Resource Partnership



## **NORM SMALLWOOD**

Norm is a recognized authority in developing businesses and their leaders to deliver results and increase value. His current work relates to increasing business value by building organization, strategic HR and leadership capabilities that measurably impact market value.



## **JON YOUNGER**

Jon's career has been a mix of consulting, executive management, and HR leadership. Prior to joining The RBL Group, he was Chief Learning and Talent Officer of one of the largest U.S.-based financial services organizations, responsible for the leadership development, corporate learning, staffing, performance and talent management, and succession planning. He has also managed executive compensation and HR strategy.

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