CHAPTER 2

Accelerate Your Learning

Chris Hadley headed the quality assurance function at Dura Corporation, a medium-sized software services company. When Chris's boss left to become vice president of operations at Phoenix Systems, a struggling software developer, he asked Chris to join him as head of the product quality and testing unit. Although it was a lateral move, Chris jumped at the opportunity to lead a turnaround.

Dura was a world-class software development operation. Chris had joined the company right out of engineering school and had risen rapidly in the quality function. He was highly skilled; however, he had grown up in an environment with state-of-the-art technology and a motivated workforce. Having visited the Phoenix product testing group before taking the job, Chris knew that it did not come close to measuring up. He was determined to change that—and quickly.

Soon after arriving, Chris declared Phoenix's existing processes outdated and went on record as saying that the operation needed to be rebuilt from the ground up "the Dura way." He immediately brought in operations consultants, who delivered a scathing report, characterizing the Phoenix's testing technology and systems as "antiquated" and the skills of the workforce as "inadequate." They recommended a thorough reorganization of the product testing process as well as substantial investments in technology and worker training. Chris shared this information with his direct reports, saying that he planned to act quickly on the recommendations, starting with a reorganization of the product testing teams "the way we did things at Dura."

Only a month after the new structure was put in place, productivity in the unit plummeted, threatening to delay the launch of a key new product. Chris convened his direct reports and urged them to "get the problems fixed, and fast." But the problems remained, and morale throughout the operation slumped.

After only two months in his new role, Chris's boss told him, "You've alienated just about everyone. I brought you here to improve quality, not tear it down." His boss then peppered him with questions: "How much time did you spend learning about the operation? Did you know they've been asking for more investment for years? Have you seen what they were able to accomplish before you arrived with the resources they were given? You've got to stop doing and start listening."

Shaken, Chris held sobering discussions with his managers, supervisors, and groups of workers. He learned a lot about the creativity they had displayed in dealing with the lack of investment in the operation. He also got direct feedback about what was not working with his new structure. He called an all-hands meeting and announced that, based on the feedback he had received, there would be significant adjustments to the structure.

He also committed to upgrading testing technology and training before making any other changes.

What did Chris do wrong? Like many new leaders, he failed to focus on learning about his new organization and so made some bad decisions that undercut his credibility.

The first task in making a successful transition is to accelerate your learning. Effective learning gives you the foundational insights you need as you build your plan for the next 90 days. So it is essential to figure out what you need to know about your new organization and then to learn it as rapidly as you can. The more efficiently and effectively you learn, the more quickly you will close your window of vulnerability. You can identify potential problems that might erupt and take you offtrack. The faster you climb the learning curve, the earlier you can begin to make good business decisions.

Overcoming Learning Roadblocks

When a new leader derails, failure to learn effectively is almost always a factor. Early in your transition you inevitably feel as if you are drinking from a fire hose. There is so much to absorb that it's difficult to know where to focus. Amid the torrent of information coming your way, it's easy to miss important signals. Or you might focus too much on the technical side of the business—products, customers, technologies, and strategies—and shortchange critical learning about culture and politics.

To compound this problem, surprisingly few managers have received training in systematically diagnosing organizations. Those who have had such training invariably prove to be either human resource professionals or former management consultants.

A related problem is a failure to plan to learn. *Planning to learn* means figuring out in advance what the important questions are and how you can best answer them. Few new leaders take the time to think systematically about their learning priorities. Fewer still explicitly create a learning plan when entering a new role.

Some leaders even have "learning roadblocks," internal barriers to learning. One example is Chris's failure to focus on understanding the history of the organization. A baseline question you always should ask is, "How did we get to this point?" Otherwise, you risk tearing down existing structures or processes without knowing why they were put there in the first place. Armed with insight into the organization's history, you may indeed decide that things need to change. Or you may find there is a good reason to leave it exactly where it is.

A related learning block, as mentioned in the introduction, is the action imperative. The primary symptom is a nearly compulsive need to take action. Effective leaders strike the right balance between doing (making things happen) and being (observing and reflecting). But it is challenging, as Chris Hadley found, to let yourself "be" during transitions. And the pressure to "do" almost always comes more from inside the leader than from outside forces; it reflects a lack of confidence and a consequent need to prove yourself. Remember: simply displaying a genuine desire to learn and understand translates into increased credibility and influence.

So if you habitually find yourself too anxious or too busy to devote time to learning, you may suffer from the action imperative. It is a serious affliction, because often, being too busy to learn results in a death spiral. If, like Chris, you do not focus on learning, you can easily make poor early decisions that undermine your credibility, alienate potential supporters, and make people less likely to share important information with you. The result is that you make more bad decisions and enter a vicious cycle

that can irreparably damage your credibility. So beware. It may feel right to enter a new situation and begin acting decisively—and sometimes, as you will see in the next chapter, it *is* the right thing to do—but you risk being poorly prepared to see the real problems.

Perhaps most destructive of all, some new leaders arrive, as Chris did at Phoenix, with "the" answer. They have already made up their minds about what the organization's problems are and how to solve them. Having matured in organizations where things were done "the right way," these leaders fail to realize that what works well in one organization may fail miserably in another. As Chris found out the hard way, coming in with the answer leaves you vulnerable to making serious mistakes and is likely to alienate people. Chris thought he could simply import what he had learned at Dura to fix the Phoenix plant's problems.

Leaders who are onboarding into new organizations must therefore focus on learning and adapting to the new culture. Otherwise they risk suffering the organizational equivalent of organ rejection syndrome (with the new leaders being the organs). They do things that trigger the organization's immune system and find themselves under attack as a foreign body. Even in situations (such as turnarounds) when you have been brought in explicitly to import new ways of doing things, you still have to learn about the organization's culture and politics to socialize and customize your approach.

Managing Learning as an Investment Process

If you approach your efforts to get up to speed as an investment process—and your scarce time and energy as resources that deserve careful management—you will realize returns in the form of actionable insights. An *actionable insight* is knowledge that enables

you to make better decisions earlier and so helps you quickly reach the break-even point in personal value creation. Chris would have acted differently if he had known that (1) senior management at Phoenix had systematically underinvested in the past, despite energetic efforts by local managers to upgrade, (2) the operation had achieved remarkable results in quality and productivity given what it had to work with, and (3) the supervisors and workforce were justifiably proud of what they had accomplished.

To maximize your return on investment in learning, you must effectively and efficiently extract actionable insights from the mass of information available to you. Effective learning calls for figuring out *what* you need to learn so that you can focus your efforts. Devote some time to defining your learning agenda as early as possible, and return to it periodically to refine and supplement it. Efficient learning means identifying the best available sources of insight and then figuring out how to extract maximum insight with the least possible outlay of time. Chris's approach to learning about the Phoenix operation was neither effective nor efficient.

Defining Your Learning Agenda

If Chris had it to do over, what might he have done? He would have planned to engage in a systematic learning process—creating a virtuous cycle of information gathering, analyzing, hypothesizing, and testing.

The starting point is to begin to define your learning agenda, ideally before you formally enter the organization. A learning agenda crystallizes your learning priorities: what do you most need to learn? It consists of a focused set of questions to guide your inquiry or the hypotheses you want to explore and test, or both. Of course, learning during a transition is iterative: at first, your

learning agenda will consist mostly of questions, but as you learn more, you will hypothesize about what is going on and why. Increasingly, your learning will shift toward fleshing out and testing those hypotheses.

How should you compile your early list of guiding questions? Start by generating questions about the past, the present, and the future (see boxes, "Questions About the Past," "Questions About the Present," and "Questions About the Future"). Why are things done the way they are? Are the reasons something was done (for example, to meet a competitive threat) still valid? Are conditions changing so that something different should be done in the future? The accompanying boxes offer sample questions in these three categories.

Questions About the Past

Performance

- How has this organization performed in the past? How do people in the organization think it has performed?
- How were goals set? Were they insufficiently or overly ambitious?
- Were internal or external benchmarks used?
- What measures were employed? What behaviors did they encourage and discourage?
- What happened if goals were not met?

Root Causes

- If performance has been good, why has that been the case?
- What have been the relative contributions of strategy, structure, systems, talent bases, culture, and politics?

- If performance has been poor, why has that been the case? Do the primary issues reside in the organization's strategy? Its structure? Its technical capabilities? Its culture? Its politics?

History of Change

- What efforts have been made to change the organization? What happened?
- Who has been instrumental in shaping this organization?

Questions About the Present

Vision and Strategy

- What is the stated vision and strategy?
- Is the organization really pursuing that strategy? If not, why not? If so, will the strategy take the organization where it needs to go?

People

- Who is capable, and who is not?
- Who is trustworthy, and who is not?
- Who has influence, and why?

Processes

- What are the key processes?
- Are they performing acceptably in quality, reliability, and timeliness? If not, why not?

Land Mines

- What lurking surprises could detonate and push you offtrack?
- What potentially damaging cultural or political missteps must you avoid?

Early Wins

- In what areas (people, relationships, processes, or products) can you achieve some early wins?

Questions About the Future

Challenges and Opportunities

- In what areas is the organization most likely to face stiff challenges in the coming year? What can be done now to prepare for them?
- What are the most promising unexploited opportunities? What would need to happen to realize their potential?

Barriers and Resources

- What are the most formidable barriers to making needed changes? Are they technical? Cultural? Political?
- Are there islands of excellence or other high-quality resources that you can leverage?
- What new capabilities need to be developed or acquired?

Culture

- Which elements of the culture should be preserved?
- Which elements need to change?

As you work to answer these questions, think, too, about the right mix of technical, interpersonal, cultural, and political learning.[1] In the technical domain, you may have to grapple with unfamiliar markets, technologies, processes, and systems. In the interpersonal domain, you need to get to know your boss, peers, and direct reports. In the cultural domain, you must learn about norms, values, and behavioral expectations, which are almost certainly different from those in the organization you came from, even if you're moving between units in the same company. In the political domain, you must understand the *shadow organization*—the informal set of processes and alliances that exist in the shadow of the formal structure and strongly influence how work actually gets done. The political domain is both important and difficult to understand, because it isn't easily visible to those who have not spent time in the organization and because political land mines can easily stymie your efforts to establish a solid base of support during the transition.

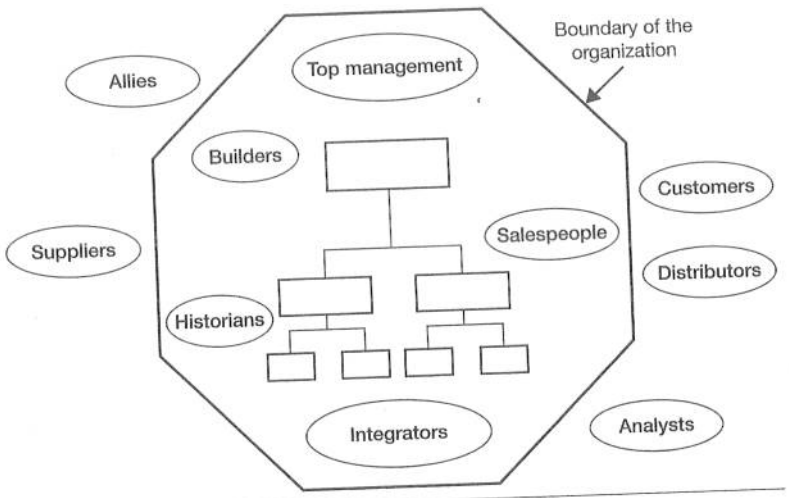
Identifying the Best Sources of Insight

You will learn from various types of hard data, such as financial and operating reports, strategic and functional plans, employee surveys, press accounts, and industry reports. But to make effective decisions, you also need "soft" information about the organization's strategy, technical capabilities, culture, and politics. The only way to gain this intelligence is to talk to people who have critical knowledge about your situation.

Who can provide the best return on your learning investment? Identifying promising sources will make your learning both comprehensive and efficient. Keep in mind that you need to listen to key people both inside and outside the organization (see figure 2-1). Talking to people with different points of view will deepen your insight. Specifically, it will help you translate between external

FIGURE 2-1

Sources of knowledge



realities and internal perceptions, and between people at the top of the hierarchy and people on the front lines.

The most valuable external sources of information are likely to be the following:

- **Customers.** How do customers—external or internal—perceive your organization? How do your best customers assess your products or services? How about your customer service? If your customers are external, how do they rank your company against your competitors?
- **Suppliers.** Suppliers can give you their perspectives on your organization in its role as a customer. You can also learn about the strengths and flaws of your internal systems for managing quality and customer satisfaction.
- **Distributors.** From distributors, you can learn about the logistics of product movement, customer service, and

competitors' practices and offerings. You can also get a sense of the distributors' own capabilities.

- **Outside analysts.** Analysts can give you a fairly objective assessment of your company's strategy and capabilities as well as those of your competitors. Analysts also have a broad overview of the demands of the market and the economic health of the industry.

Indispensable internal information sources are the following:

- **Frontline R&D and operations.** These are the people who develop and manufacture your products or deliver your services. Frontline people can familiarize you with the organization's basic processes and its relationships with key external constituencies. They can also shed light on how the rest of the organization supports or undermines efforts on the front line.
- **Sales and procurement.** These people, along with customer service representatives and purchasing staff, interact directly with customers, distributors, and suppliers. Often they have up-to-date information about trends and imminent changes in the market.
- **Staff.** Talk with heads or key staff members of the finance, legal, and human resource functional areas. These people have specialized but useful perspectives on the internal workings of the organization.
- **Integrators.** Integrators are people who coordinate or facilitate cross-functional interaction, including project managers, plant managers, and product managers. You can learn from them how links within the company work and how the functions mesh. These people also can help you discover the true political hierarchies and identify where internal conflicts lie.
- **Natural historians.** Keep an eye out for "old-timers" or natural historians—people who have been with the organization for a long time and who naturally absorb its history. From these people, you can learn about the company's mythology (key stories about how the organization came to be and trials it has gone through) and the roots of its culture and politics.

If you are new to the organization, there often is much you can do to accelerate the onboarding process before you arrive. The starting point, beyond the recruiting process, is to leverage the rich array of resources available online, including background information and analysis of the organization, biographies of key people, and information available on the organization's own website. Beyond that, it is highly desirable, if possible, to reach out to current or former employees to get a bead on the history and culture.

Adopting Structured Learning Methods

Once you have a rough sense of what you need to learn and where to seek it—whether from reports, conversations with knowledgeable people, or electronic resources—the next step is to understand how best to learn.

Many leaders tend to dive in and start talking to people. You will pick up much soft information in this way, but it is not efficient. That's because it can be time-consuming and because its lack of structure makes it difficult to know how much weight to place on various individuals' observations. Your views may be shaped excessively by the first few people (or last few) with

whom you talk. And people may seek you out early precisely to influence you.

Instead, you should consider using a structured learning process. To illustrate the advantages of this approach, imagine that you plan to meet with your direct reports to elicit their assessments. How might you go about doing this? Bringing them together right away might be a mistake, because some people will hesitate to reveal their views in a public forum.

So you might start by meeting them one-on-one. Of course, this method has its drawbacks, too, because you have to meet people in some order. You should therefore expect that the people who are later on your schedule will talk to the earlier ones to try to get a sense of what you're after. This may reduce your ability to gain a range of views and may allow others to interpret your messages in ways you might not intend.

Suppose you decide to meet with your direct reports one-on-one. In what order will you meet with them? And how will you avoid being excessively influenced by what the first couple of people say? One approach is to keep to the same script in all your meetings. You might start with brief opening remarks about yourself and your approach, followed by questions about the other person (background, family, and interests) and then a standard set of questions about the business. This approach is powerful, because the responses you get are comparable. You can line them up side by side and analyze what is consistent and inconsistent about the responses. This comparison helps you gain insight into which people are being more or less open.

When you are diagnosing a new organization, start by meeting with your direct reports one-on-one. (This is an example of taking a horizontal slice across an organization by interviewing people at the same level in different functions.) Ask them essentially the same five questions:

1. What are the biggest challenges the organization is facing (or will face in the near future)?
2. Why is the organization facing (or going to face) these challenges?
3. What are the most promising unexploited opportunities for growth?
4. What would need to happen for the organization to exploit the potential of these opportunities?
5. If you were me, what would you focus attention on?

These five questions, coupled with careful listening and thoughtful follow-up, are certain to elicit many insights; think of what Chris might have learned by using this approach. By asking everyone the same set of questions, you can identify prevalent and divergent views and thus avoid being swayed by the first or most forceful or articulate person you talk to. How people answer can also tell you a lot about your new team and its politics. Who answers directly, and who is evasive or prone to tangents? Who takes responsibility, and who points fingers? Who has a broad view of the business, and who seems stuck in a silo?

Once you have distilled these early discussions into a set of observations, questions, and insights, convene your direct reports as a group, feed them back your impressions and questions, and invite discussion. You will learn about both substance and team dynamics and will simultaneously demonstrate how quickly you have begun to identify key issues.

You need not follow this process rigidly. You could, for example, get an outside consultant to do some diagnosis of the organization and feed back the results to your group (see "Assimilating New Leaders"). Or you could invite an internal facilitator to run the process. The point is that even a modest structure—a script

and a sequence of interactions, such as meeting with people individually, doing some analysis, and then meeting with them together—can dramatically accelerate your ability to extract actionable insights. Naturally, the questions you ask will be tailored for the groups you meet. If you're meeting with salespeople, for example, consider asking, What do our customers want that they're getting from our competitors and not getting from us?

Assimilating New Leaders

One example of a structured learning method is the new leader assimilation process originally developed by GE. In this process, each time a manager enters a significant new role, he is assigned a transition facilitator. The facilitator meets first with the new leader to lay out the process. This is followed by a meeting with the leader's new direct reports in which they are asked questions such as, What would you like to know about the new leader? What would you like him to know about you? About the business situation? The main findings are then fed back, without attribution, to the new leader. The process ends with a facilitated meeting between the new leader and the direct reports.

Another example of a structured learning method is the use of a framework such as SWOT (strengths, weaknesses, opportunities, and threats) analysis to guide your diagnostic work. These sorts of frameworks also can be powerful tools for communicating with key stakeholders—bosses, peers, and direct reports—to help create shared views of the situation. Other structured learning methods are valuable in particular situations. Some of the methods described in table 2-1 may increase the efficiency of your learning process depending on your level in the organization and the business situation. Effective new leaders employ a

TABLE 2-1

Structured methods for learning

Method	Uses	Useful for
Organizational climate and employee satisfaction surveys	Learning about culture and morale. Many organizations do such surveys regularly, and a database may already be available. If not, consider setting up a regular survey of employee perceptions.	Useful for managers at all levels if the analysis is available specifically for your unit or group. Usefulness depends on the granularity of the collection and analysis. This also assumes the survey instrument is a good one and the data has been collected carefully and analyzed rigorously.
Structured sets of interviews with slices of the organization or unit	Identifying shared and divergent perceptions of opportunities and problems. You can interview people at the same level in different departments (a horizontal slice) or bore down through multiple levels (a vertical slice). Whichever dimension you choose, ask everybody the same questions, and look for similarities and differences in people's responses.	Most useful for managers leading groups of people from different functional backgrounds. Can be useful at lower levels if the unit is experiencing significant problems.
Focus groups	Probing issues that preoccupy key groups of employees, such as morale issues among frontline production or service workers. Gathering groups of people who work together also lets you see how they interact and identify who displays leadership. Fostering discussion promotes deeper insight.	Most useful for managers of large groups of people who perform a similar function, such as sales managers or plant managers. Can be useful for senior managers as a way of getting quick insights into the perceptions of key employee constituencies.

(Continued)

TABLE 2-1

Structured methods for learning (*continued*)

Method	Uses	Useful for
Analysis of critical past decisions	Illuminating decision-making patterns and sources of power and influence. Select an important recent decision, and look into how it was made. Who exerted influence at each stage? Talk with the people involved, probe their perceptions, and note what is and is not said.	Most useful for higher-level managers of business units or project groups.
Process analysis	Examining interactions among departments or functions and assessing the efficiency of a process. Select an important process, such as delivery of products to customers or distributors, and assign a cross-functional group to chart the process and identify bottlenecks and problems.	Most useful for managers of units or groups in which the work of multiple functional specialties must be integrated. Can be useful for lower-level managers as a way of understanding how their groups fit into larger processes.
Plant and market tours	Learning firsthand from people close to the product. Plant tours let you meet production personnel informally and listen to their concerns. Meetings with sales and production staff help you assess technical capabilities. Market tours can introduce you to customers, whose comments can reveal problems and opportunities.	Most useful for managers of business units.
Pilot projects	Gaining deep insight into technical capabilities, culture, and politics. Although these insights are not the primary purpose of pilot projects, you can learn a lot from how the organization or group responds to your pilot initiatives.	Useful for managers at all levels. The size of the pilot projects and their impact will increase as you rise through the organization.

combination of methods, tailoring their learning strategy to the demands of the situation.

Creating a Learning Plan

Your *learning agenda* defines what you want to learn. Your *learning plan* defines how you will go about learning it. It translates learning goals into specific sets of actions—identifying promising sources of insight and using systematic methods—that accelerate your learning. Your learning plan is a critical part of your overall 90-day plan. In fact, as you will discover later, learning should be a primary focus of your plan for your first 30 days on the job (unless, of course, there is a disaster in progress).

The heart of your learning plan is a cyclical learning process in which you collect information, analyze and distill it, and develop and test hypotheses, thus progressively deepening your understanding of your new organization. Obviously, the specific insights you decide to pursue will vary from situation to situation. You can begin by working with the learning plan template shown here (see box, "Learning Plan Template"). In chapter 3, you will explore various types of transition situations and return to the subject of what you need to learn and when.

Learning Plan Template

Before Entry

- Find out whatever you can about the organization's strategy, structure, performance, and people.
- Look for external assessments of the performance of the organization. You will learn how knowledgeable, fairly

unbiased people view it. If you are a manager at a lower level, talk to people who deal with your new group as suppliers or customers.

- Find external observers who know the organization well, including former employees, recent retirees, and people who have transacted business with the organization. Ask these people open-ended questions about history, politics, and culture. Talk with your predecessor if possible.
- Talk to your new boss.
- As you begin to learn about the organization, write down your first impressions and eventually some hypotheses.
- Compile an initial set of questions to guide your structured inquiry after you arrive.

Soon After Entry

- Review detailed operating plans, performance data, and personnel data.
- Meet one-on-one with your direct reports and ask them the questions you compiled. You will learn about convergent and divergent views and about your reports as people.
- Assess how things are going at key interfaces. You will hear how salespeople, purchasing agents, customer service representatives, and others perceive your organization's dealings with external constituencies. You will also learn about problems they see that others do not.
- Test strategic alignment from the top down. Ask people at the top what the company's vision and strategy are. Then see how far down into the organizational hierarchy those beliefs penetrate. You will learn how well the previous leader drove vision and strategy down through the organization.

- Test awareness of challenges and opportunities from the bottom up. Start by asking frontline people how they view the company's challenges and opportunities. Then work your way up. You will learn how well the people at the top check the pulse of the organization.
- Update your questions and hypotheses.
- Meet with your boss to discuss your hypotheses and findings.

By the End of the First Month

- Gather your team to feed back to them your preliminary findings. You will elicit confirmation and challenges of your assessments and will learn more about the group and its dynamics.
- Now analyze key interfaces from the outside in. You will learn how people on the outside (suppliers, customers, distributors, and others) perceive your organization and its strengths and weaknesses.
- Analyze a couple of key processes. Convene representatives of the responsible groups to map out and evaluate the processes you selected. You will learn about productivity, quality, and reliability.
- Meet with key integrators. You will learn how things work at interfaces among functional areas. What problems do they perceive that others do not? Seek out the natural historians. They can fill you in on the history, culture, and politics of the organization, and they are also potential allies and influencers.
- Update your questions and hypotheses.
- Meet with your boss again to discuss your observations.

Getting Help

The primary responsibility for accelerating your learning rests on you, the leader. However, there are many other players whose support can make the learning process a lot less painful. There is much that bosses, peers, and even direct reports can do to accelerate your learning. However, to enlist their aid you need to be clear about what you're trying to do and how they can help. Critically, you need to be willing to ask in the first place and not feel that you should know everything and be in complete control from the moment you walk through the door.

Support for learning is particularly important for leaders joining new organizations. This is true whether you have been hired from the outside (onboarding) or making a move between units in the same organization (inboarding, which, as discussed earlier, is roughly 70 percent as difficult as being hired from the outside). In both cases, you likely will enter a different culture and will lack the political wiring you had in your previous role. If your new organization has an effective onboarding system, it should help you understand the culture and speed the process of identifying and connecting with key stakeholders. If it doesn't, ask for this type of help.

Closing the Loop

Your learning priorities and strategies will inevitably shift as you dig deeper. As you start to interact with your new boss, figure out where to get some early wins, or build supportive coalitions, it will be critical for you to gain additional insights. So plan to return to this chapter periodically to reassess your learning agenda and create new learning plans.

ACCELERATE YOUR LEARNING—CHECKLIST

1. How effective are you at learning about new organizations? Do you sometimes fall prey to the action imperative? To coming in with "the" answer? If so, how will you avoid doing this?
2. What is your learning agenda? Based on what you know now, compose a list of questions to guide your early inquiries. If you have begun to form hypotheses about what is going on, what are they, and how will you test them?
3. Given the questions you want to answer, who is likely to provide you with the most useful insights?
4. How might you increase the efficiency of your learning process? What are some structured ways you might extract more insight for your investment of time and energy?
5. What support is available to accelerate your learning, and how might you best leverage it?
6. Given your answers to the previous questions, start to create your learning plan.