

*the*  
**navalent**  
*quarterly*



**RISING**

SUMMER 2018

**Top Level:** *Know how to succeed*

**Promotion:** *Make sure you keep it*

**Ascent:** *Understanding how you add value*

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# NQ15: RISING

By Jarrod Shappell



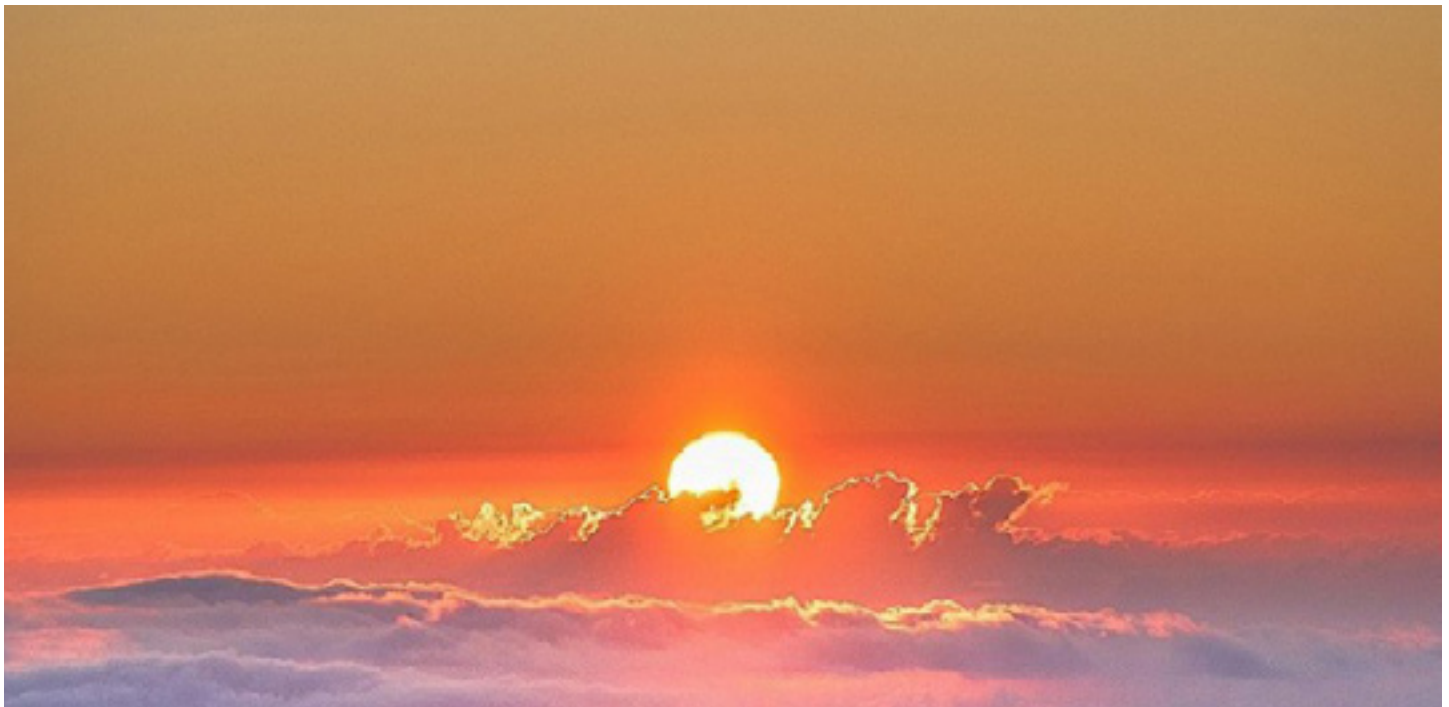
A client of mine was recently featured in the Washington Post. I wrote an email to congratulate her on this accomplishment. Her reply was “I didn’t even recognize myself. I’ve become, like, a leader now.”

Most executives take the reigns of their organization before they are ready and like my client, can hardly recognize themselves once they are there. Employees do excellent work and then suddenly find themselves rewarded with positions of power and influence. Whether you are a start-up founder who’s team has grown from the corner of a co-working space to a shmancy office, or you’ve been faithful to your company for 15 years and are now brandishing a vice president title, the leadership transition is often disorienting and brings more questions than answers.

- *How did I get here?*
- *Do I have what it takes to stay here, and do I want to?*
- *Can I be a different leader than the ones that I have followed?*
- *What don’t I know that I need to know to succeed at this level?*

Executives usually keep these questions to themselves. After all, the c-suite title is what so many are reaching for. But leaders often fail to anticipate the cost accompanying such an achievement. Trusted peer relationships you once used to discuss your boss’s decisions have morphed into direct reports complaining about you. People who used to be your senior are now peers, and political rivals. Cherished direct reports are now distant from you and resent your success. Decisions take longer to make, and come with more ambiguity. The initial shock and disorientation executives feel when entering bigger roles (which we refer to as “altitude sickness” and will write more about later) is compounded by isolation, risk, and privately-held fears.

In the broader world of building meaningful careers, we have dangerously confused “rising” with “preparation.”




Our modern corporate jargon doesn't help rising leaders orient either. The "corporate ladder" verbiage can lead us to believe that there is a linear, up and to the right journey with rungs and steps that serve as checkpoints for our preparation. Those steps define an alleged predictable path to success. And we dangerously presume that each rung confers a new degree of competence. (hint: it doesn't). Rather than a linear journey, the path to being an exceptional executive is more indirect housing a variety of experiences – both professional and personal. Growth is rarely that foreseeable, and always messy.

In the broader world of building meaningful careers, we have dangerously confused "rising" with "preparation." We act as if elevating someone means they're able, willing, and ready. But what if we actually defined rising as preparation? What if we completely upended our understanding of what transformational leadership meant? What if "to rise" meant "to prepare" instead of "to arrive?"

In this quarter's posts, we will share what we have learned about that preparation through our research and experience. Rather than creating a list of developmental milestones that each leader must go through, our hope with this Navalent Quarterly is to honestly discuss the messy challenges and opportunities that accompany leadership development.

Because ultimately, we know that each leadership ascent is a uniquely human ascent. Or as Warren Bennis puts it "No leader sets out to be a leader. People set out to live their lives, expressing themselves fully. When that expression is of value, they become leaders. So the point is not to become a leader. The point is to become yourself, to use yourself completely – all your skills, gifts and energies – in order to make your vision manifest. You must withhold nothing. You, must, in sum, become the person you started out to be, and to enjoy the process of becoming."

So, please set out with us this quarter as we aim to help all emerging leaders enjoy the process of becoming, like, a leader. 





## THE TRADE-OFFS AT THE TOP By Whitney Harper

***Rising in an organization requires much of you. Do you know why you want to rise? How do you discern if you are ready for the ascent? This article will highlight the various trade-offs that are associated with a professional rise.***

There I was, at the highest point of the Machu Picchu trail in Peru, flat on my back and full of regret. I was in my tent with altitude sickness and my two traveling companions, my sisters, were laughing, playing cards, and drinking tea with our guide. The contrast between their joy and my misery couldn't have been starker.

I was to blame for my predicament. I foolishly chose to be cheap and thought it better to save money than to hire a seasoned Peruvian guide to carry my pack. I also turned down my sister's offer of altitude sickness pills when we started to gain elevation. These two choices created unfortunate consequences, and it was painfully clear how my experience could have gone differently had I been more thoughtful.

Hiking is an apt analogy for the challenges that come with blazing a career path. In your career, you will have obstacles in your path; gain and lose elevation multiple times; be at the mercy of the external environment; be forced to make trade-offs sometimes without a full knowledge of the consequences, and experience the effects of altitude sickness when rising too quickly and being ill-prepared. With our experience of coaching executives at a variety of stages in their career path, we have noticed some common themes, including the critical trade-offs that individuals should anticipate and be prepared to navigate as they rise to increasing positions of leadership.

For example:

**Social:** Without question, rising in an organization can place a strain on personal relationships. Whether you are single and trying to find a partner, married and balancing your role as spouse, or a parent juggling the demands of children and home life, aspiring leaders must think proactively, communicate, and set expectations with those in their life. In addition, research around the increased likelihood of divorce for workaholics is well-documented, and in our view, possible to avoid.

**Emotional:** Consistent with my Machu Picchu experience, pride and ignorance are a dangerous combination and can result in painful, unexpected consequences. Your inner critic can also gain momentum and power as you rise in your career, constantly filling your headspace with unproductive thoughts. As one article points out, workaholism may be “the best-dressed mental health problem.”

**Physical:** Many executives experience a physical toll on their body due to increased levels of stress from both the workload and the impact of other trade-offs listed above. Anxiety, diabetes, and accelerated aging are just a few of the physical tolls of an intense career.


At the risk of sounding all doom and gloom, the truth of the matter is that acknowledging and talking about these realities is vitally important. There is always a cost to ascending. The stress and discomfort of climbing don't go away and the sooner that we accept and expect these conditions, the sooner we can continue the ascent in health, emotionally, physically, and socially. What we have found from our clients who ascend in a healthy, sustainable manner, is that they are anchored with a strong support network, physical stamina, and a clear perspective on the trade-offs, able to survive the journey and even pause and enjoy the vistas along the way.



To assess your own readiness and potential pathways, consider a few questions:

- ***How strong is your support network? How will it evolve over the next 5-10 years?***
- ***What relationships will grow stronger with the stress of an intense career phase? What relationships may need to be shored up to prepare for the obstacles ahead?***
- ***How healthy is your lifestyle? What choices do you need to make to put yourself into peak physical condition?***

As you ponder these questions, consider the consequences of how you answer them. And when you do find yourself gasping for air, nauseous from altitude sickness, take a moment to reflect on the choices that put you into that situation so that you will be better prepared for the next peak.

As with most journeys in life, perspective is maintained by balancing the amount of pain one can handle to the joys of pursuing a challenging course. The views can be spectacular. New relationships are formed as you seek hiking partners on similar climbs. Spouses and children can be inspired by your pursuits, and you can also empathize with them as they pursue their own trails. Our bodies can become stronger when tested physically as long as you prepare and manage risks accordingly. For those that are pursuing ascents while in peak performance, the vistas are well worth the effort. 





# Got a Promotion? Here's How To Make Sure You Keep It

*By Ron Carucci*



You've just been promoted to a more senior position. Before you run headlong into taking action, be smart about your opening moves. Whatever the role is, you'll have some odds to overcome. According to Corporate Executive Board, your chance of failure is between 50 and 70 percent. With any luck, you won't be among the three percent of executive transitions that "fail spectacularly."

Why do so many promotions end in disaster? For starters, few leaders know how to navigate the transition from the middle of the organization where work is more tactical to the upper level of the organization where more strategic and uncertain work is done. Many new leaders enter bigger jobs with unshakeable faith in their mandate and vision. They have a pre-constructed idea about the impact they'll create, and they're eager to hit the ground running.

To do so, enter into your promotion as if you were an anthropologist studying a new culture. Set aside your preconceived notions and devote yourself to learning about the people, relationships, and dynamics at the heart of the organization. Only through continuous study will you discover what kind of change is truly possible. In our 10-year longitudinal study, we uncovered some common pitfalls that snare otherwise promising leaders once promoted. Here are five ways to avoid those pitfalls and secure the success you worked so hard to achieve.



### **1. Recalibrate relationships with new and former peers.**

One of the most confounding challenges in an upward move is your reconfigured peer set. Now that you're an executive, your former peers—some of whom are now direct reports—are no longer sure they can trust you. Your new peers withhold their trust as well, because at higher levels, stakes are higher, the wins and losses more public, and the competition more ruthless.

Despite apparent risks, it is now more important than ever to establish solid relationships with both your former and current peer groups. To do so, you must display an unwavering sense of self, integrity, courage, and a willingness to acquire knowledge in service of the greater good. Don't let setbacks or rivalries with peers throw you. Re-set boundaries and expectations by openly talking about them. Remember that you have to purposefully and thoughtfully construct, and reconstruct, your relationships one at a time.

### **2. Leverage your knowledge of the organization without biases.**

The good news is that as an internal promotion, you're more likely to perform better and serve longer than an external hire. After all, you know how the organization works and how decisions get made. The organization knows you, as well — and your status as a known entity will often serve as an advantage.

However, you and the organization also have biases about one another that may distort the accuracy of your knowledge. You may have deeply formed beliefs about your new boss. You may believe this is your chance to right organizational injustices you've long complained about. You may see peers as political rivals instead of allies. Any preconception, if not carefully deconstructed, can become a liability. You must recognize and address bias with honesty and intention.

### **3. Extract yourself from the work you used to do.**

It is challenging for many newly promoted leaders to let go of the work they know. They often argue that their successors "simply aren't ready to take on the full set of responsibilities," so these leaders plan to extract themselves "gradually" so as not to create a huge gap. Unfortunately, gradual extraction usually stretches into years, with the full transfer of responsibility never occurring. This arrests the development of leaders behind you, and stunts the organization's growth. While work you used to do well, that made you successful, is understandably more gratifying than more strategic, ambiguous work at this higher level, let it go. A well-choreographed plan that plots your extraction in measurable milestones will ensure you leave behind a more capable organization that is not dependent on you for success. In turn, this creates sufficient capacity for you to focus on succeeding at your new altitude.




#### 4. Size up talent and build a team.

One of the hardest aspects of rising to a bigger job is inheriting your predecessor's team. There is no guarantee that the team in place — many of whom may be former peers — is right for you. Therefore, you must form a systematic way to assess who can stay, who can grow, and who must go.

Most newly appointed executives gravitate to one of two extremes. They are reluctant to make hard calls, especially early in their tenure. They fear alienating their team and sending political shockwaves through the organization by removing people who are obstacles to change. Whether through a lack of competence, commitment, or both, not everyone will be able to make the journey; the sooner you are honest about this fact, the sooner you'll have a team that embraces your vision and direction. The other extreme is to "clean house on day one." People expect changes when new leaders arrive. But too much too fast can be destabilizing. It is still vital that you take time for thoughtful study and reflection, especially when people's careers are on the line. However, once you have a clear understanding of the data, don't hesitate to act. Get the people you need in place, and get the organization moving in the same direction.

#### 5. Solicit and act upon personal feedback.

If you don't have a way of knowing how your intentions and actions are being interpreted, you'll keep plodding ahead as if everything is fine — only to discover that you've left a segment of the organization behind or were blind to your own leadership flaws. You must establish a cadence of feedback loops to determine whether the messages you are sending, vision you are casting, leadership you are modeling, plans to which you are holding people to account, and the changes you are initiating, are all being metabolized as you intend. This is especially important in the first six months, when people are still forming first impressions of you. Whether you collect it through surveys, third party interviews, or other methods, consistent feedback is vital to your success. Don't worry that people's unfamiliarity with you will limit what they can offer. The key to leveraging feedback, of course, is acting upon it. Many newly promoted leaders graciously invite feedback to establish the look of openness, but damage the credibility they gain by doing nothing with it.

As a leader, if you're focusing exclusively on the changes you believe you have to make, you're ignoring the fact that you must also be the modeler of change. Indeed, to succeed in your new role, you'll need to embrace change on a deeply personal level. You must figure out how to adapt, grow, and develop a new understanding of your place within the organization. The organization must change you as much as you must change it. 

When it comes to promotions, the old cliché rings especially true: knowledge really is power. The more you know — not just about the organization, but about yourself — the better equipped you are to lead. Hit the ground learning, not running.



# Succession Planning and the Future of Your Organization

*By Josh Epperson*

## In the average organization...

- The 10-person Senior Leadership Team will lose nearly 2 of its newly appointed executives in the next 12-18 months.
- The business will pay (excluding additional cash comp) between \$710,000 - \$1M+ to hire replacements for them and that figure is expected to increase.
- Exiting executives leave with an intricate knowledge of your strategic plan, competitive positioning, and approach to differentiation.
- You likely have no formal succession planning process in place and don't understand its significance in total company success.

And perhaps counter intuitively, we believe that the first three bullets are symptoms of the last. Average organizations tout today's talent as their greatest asset. The best organizations use succession planning to safeguard their current business as well as ensure its future success. We believe the work of managing, anticipating, and planning leader transitions (both expected and unexpected) will guarantee you beat the odds and have the talent you need to realize the future you want. Why?



## People bring strategy to life.

A good strategy is formed at the intersection of market needs and an organization's capabilities to meet those needs. Leadership is one such capability that will make or break your strategic aspirations. When leaders exit the business or transition to new roles it puts that capability in jeopardy. Organizations that believe the leaders who bring their strategy to life can literally "walk out the door anytime", rely heavily on succession planning processes.

- Instead of getting hammered by analysts, succession planning shows the Street they can count on your top-of-house leadership well into the future.
- Instead of hemorrhaging market intel, industry expertise, and longstanding customer relationships, succession planning ensures knowledge transfer to emerging leader populations.
- Instead of betting on emerging markets and learning you have no leadership in such markets, succession planning gives your organization the foresight about the capability before needing it.
- Instead of overlooking internal talent for external expertise, succession planning takes a look across the business to know where existing talent could be leveraged more strategically.

Your organization benefits from succession planning only when it is directly tied to the current and future, strategic requirements of the business. Business leaders benefit from this work because it ensures they have the people they need to realize the objectives they committed to.





**The work is future-focused, now.**

Time and again, we get called for succession planning support only to find out the incumbent is exiting, “next month”, or that they have, “already exited”. That’s talent triage, not succession planning.

Succession planning ensures every leader you’re betting the future on, has two or three leaders behind them who know what in-role success looks like and how that will change in the next 24-36 months. It also ensures those leadership transitioning out know what they are transitioning to, why and what will make them successful when they arrive. Furthermore, it does away with the, “ready now” label because successfully transitioning to a future role always requires development. The transition is often a precedent (e.g. promotion or lateral move) and in-role success always evolves from potential successor evaluations to the time they assume a new role.


- Instead of believing low attrition scores justify not doing the work, succession planning assumes that all leaders will eventually move on and prepares for that even if they don’t.
- Instead of keeping an incumbent in role longer than necessary, succession planning normalizes and fosters conversations with would-be retirees and thoughtfully plans for their exit.
- Instead of getting caught off guard by the proverbial bus scenario, succession planning has you anticipating such transitions before they actually happen.
- Instead of replicating past work and success, succession planning challenges the organization to think about the future of its work and the way success in-role must evolve in the coming years.

Succession planning is an organizational asset when it is conducted in advance of the need and considers the future of that need. Business leaders benefit from this work because they take a longer-range, more realistic and evolving view of their talent and thus accelerate their ability to perform during talent transitions. Everyone benefits from the development required for transitioning leaders’ in-role success.

## So you get it. What's next?

If your organization is average or just “checking the succession planning box”, we’d encourage you to reflect on the ways your current and future success depends on effectively transitioning leaders. Jot down an example where a leadership transition could catch your organization off-guard and jeopardize its ability to meet strategic/future requirements. With that example as a backdrop...

- Build the business case for succession planning and contextualize the opportunity and risk for your organization. Leverage the research and use your organization’s financials to contextualize the business case. What will it cost your organization to plan poorly or not at all? Detail the financial and non-financial cost to your organization.
- Prioritize where to cut in, especially if you’re starting from scratch. Not all work is equally important to your strategy; thus, not all leadership positions require equal succession attention. Start with the most strategically significant roles and work out.
- Don’t go it alone. You’re likely not the only leader who feels the disconnect between strategy and planful leadership transitions. Discuss it with like-minded leaders. Have them kick the tires on your assumptions and strengthen the business case. Ensure there’s Business/HR connectivity throughout.

Whatever you do, start now. The power of succession planning is that you do it before you need it. Pain can be a great impetus for change, but capitalizing on the time before a transition that ensures all the value the work can truly afford. 







# Accidental Ascent

*By Ashley Morris*

There I was, sitting at the head of the boardroom table, with all eyes on me. I was the team lead of an international consulting project in China and both my American and Chinese colleagues looked to me to kick-off our work together. My palms began to sweat as self-doubt kicked in. Suddenly I thought, Should I be in this role? Am I qualified? Why would the Chairman of this multi-billion company listen to anything I say? As these thoughts flooded my brain, I could feel my body temperature rising.

Leading up to this project, my team and I had diligently studied Chinese cultural norms and international business practices, we caught up on Chinese current events and did as much as we could to learn about the company we were stepping into. All of this was done to prepare the team for the work ahead. However, what I neglected to do in all that preparation was plan for how I would feel in this elevated position. Here I was, suddenly in a position of influence and I felt completely inadequate! What I was experiencing was what psychologists call Imposter Syndrome.

Similar to my experience leading a team in China, these feelings of inadequacy often haunt newly appointed leaders. We often see this with our clients who are on a quick ascent up their organization's ladder. Those who were once Rockstar individual contributors or mid-managers of a smaller book of business, are now managing managers and coordinating a level of complexity they've never seen before. These leaps in altitude require a shift in how you act and behave. This shift is not only manageable, but there are steps you can take to help lessen the disorientation from being at this higher altitude in the organization.

**Your team's success is tightly correlated to your willingness to let go of personal accomplishments and focusing on the We.**

After returning from China and reflecting on my own ascent experience, I identified three things that I needed to evolve to feel comfortable leading at a new level with higher responsibilities:

## FROM A “ME” TO A “WE” MINDSET

I was really good at being that Rockstar individual contributor. I organize and synthesize information in my sleep. However, what I realized after leading this team in China was that none of that mattered. Sitting at that boardroom table in China, it wasn't about me. It was about us. The team, the We. As you go higher in your organization you go from looking out for yourself, to a family (your small team), to a village, to a tribe, and maybe even a nation. The ever-expanding circle of responsibility and influence comes with higher levels of complexity and potential drama. Helping a group that is growing in diversity remain tight-knit and focused on the collective good is a core transition for those on the rise. Your team's success is tightly correlated to your willingness to let go of personal accomplishments and focusing on the We.

## FROM EXECUTION TO COMMUNICATION

We can all think of that go-to person for getting things done, whether it's at your current company, among your group of friends, or someone on a committee you're involved with. That person was a client of mine, the executioner extraordinaire! He was a product developer in a growing tech company who excelled at getting new projects off the ground and completed. He did so well that he was promoted. But what he soon realized was his natural ability to execute mattered less in this new role. Of course, he had objectives and goals he had to meet, but these weren't the most significant. What mattered more was communicating the vision, clarifying expectations, and getting the buy-in from his team who would then go out and execute the work.

An organization is comprised of three interdependent systems, the operating system, the coordinating system, and the strategic system. A difficult part of ascending in the organization is knowing which system you're in. Each system requires something different of you. Instead of doing things myself, I had to make it possible for others to do the work to achieve goals. This was something that not only I struggled with in China, but my client struggled with in his new role. I couldn't just step in and take over the work. I mean technically you could, but that doesn't help to transform behavior and develop the people or the organization. You have to identify the collective capabilities of your team and harness that to achieve business objectives (or team objectives).



## FROM DOING TO DECIDING

As work progressed with our Chinese business partners and I was still questioning my own ability, I defaulted to what I was good at. I took on too much work, was up late each night working on data and making changes to materials. While I knew this wasn't sustainable, I was starting to sink with the amount of work I was taking on. In hindsight, I realized the value I could uniquely add was to be the decision-maker.

Research done by Gallup identified talents that are necessary of all leaders, one of which is decision-making. This is the ability to think ahead and determine the best decision while balancing competing interests and voices. One of the major transitions that ascending leaders face is that they are no longer an input to a decision, they are the decider. Holding space for others to give input, and suspending your point of view, is a key part of leading at higher levels. Your job is not to run the numbers or refine the messaging, it is to make sure each member knows how to contribute so that you can make strategic decisions to keep the work moving forward.

So, whether you're leading a new project or new to a leadership role, it's important to remember that you have ascended into a new role, which means what you were good at before, isn't a predictor if you'll do well in the next role. It requires a new mindset, a new set of skills, and a deep understanding of how you add value. 🚩







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