SRI Executive
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Virtual Onboarding

LEADERSHIP

Making onboarding personal when it's virtual

With a growing number of workers in areas under lockdown to limit the spread of COVID-19, organisations are adapting to the new dynamics of working in a virtual environment.

Much of our everyday work can be done effectively with the support of virtual tools, including onboarding newly appointed executives. High-quality onboarding of top-level leaders is more critical than ever to help support the success of organisations and their teams in a fast-changing, uncertain future. Vital aspects of onboarding— including understanding daily operations, organisational culture, team dynamics and stakeholder expectations— are all still achievable remotely with extra planning, support, and an effort to go the extra mile to reach out and make things personal.

WHAT WE BRING
In-depth expertise after working with leaders in international development for more than 20 years.

OUR APPROACH
We co-create a tailored onboarding strategy & have an agile team who can adapt to changing circumstances.

OUR RESULTS
A 20-year track-record of supporting newly appointed leaders with a roadmap to create lasting impact.

Pre-onboarding

We can ensure that your executive gets up to speed as soon as possible, at a time when organisations do not have the luxury of waiting to appoint. Drawing on our experience managing virtual teams across the globe, both internally and for our clients, we guide you through each critical step:

STEP 1: OPERATIONS AND LOGISTICS
Ensuring the new executive is set up for remote work: Touching base with a checklist of the technology and software needed to connect with new teams, and ensuring that the individual has the setup and space he or she needs. There may be a need for additional training and support ahead of time, along with accommodation and flexibility around working hours if the executive has a family at home.

Experience leading a team or interacting with a board virtually: Get a sense of the executive's level of experience, and whether any training may be needed.

Managing communications: Consider how you and the executive will handle communications with stakeholders, donors, or advisors virtually to ensure a timely, continual flow of information.

STEP 2: DEVELOPMENT OF KPIS
Where needed, agreeing the executive's KPIs with the board helps guide progression and future performance.

STEP 3: REVIEWING STRUCTURE & CULTURAL DYNAMICS
Gather key information about the current organisational climate, performance and team culture. Through this step, a new executive can get a clear picture of the Senior Management Team's (SMT) dynamics, as well as any strengths or capacity gaps. This will support the creation of a 100-day plan.

Virtual onboarding

STEP 1: FORMING INTERNAL & EXTERNAL STAKEHOLDER RELATIONSHIPS
Mapping your organisation's stakeholders and gathering their viewpoints to understand opportunities, strengths and emerging risks allows your new leader to determine how the organisation can adapt to achieve its goals. It is also crucial to consider how to support the new executive to start networking and building relationships with these stakeholders.

STEP 2: 100-DAY PLAN
The information gathered during pre-onboarding can validate your executive's plan and priorities for the first 100 days. It will help the executive communicate these priorities with the SMT and wider organisation, and virtual meetings will be central to this.

STEP 3: LEADERSHIP TEAM EFFECTIVENESS
Foster strong working relationships with the SMT, board and any other units/teams the new executive will need to engage. Face-to-face meeting might not be possible, but executives can build relationships and share thoughts during regular virtual communication.

STEP 4: EARLY WINS AND IMPROVEMENTS
Identifying early opportunities for success, as well as challenges the new executive will face based on experience, leadership style, or internal/organisational issues.

TIPS FOR VIRTUAL

- Prepare a call or document outlining how the organisation has adapted to current circumstances

- Preparation and agendas ahead of calls with key stakeholders

- Challenge team members to touch base daily during first few weeks

- Allow extra time: longer conversations to build rapport, time for decision-making during this stressful time

- Plan for how to communicate clearly about the role and align stakeholder expectations

- Convey culture with consistent 1:1 and team catch-ups via virtual coffee meetings