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TRANSCRIPT

ONBOARDING YOUR NONPROFIT'S C-SUITE EXECUTIVE: HOW TO MAKE A LASTING IMPRESSION

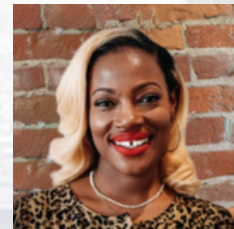
ONBOARDING YOUR NONPROFIT'S C-SUITE EXECUTIVE: HOW TO MAKE A LASTING IMPRESSION

Welcoming a new C-suite executive into your organization can be both an exciting and daunting task. Set your new executive up for success by preparing strategies at every stage of the pre-boarding and onboarding process to ensure a successful integration and a positive early experience. A recent global study found that when grading onboarding experiences on a scale of 1 to 100, executives in the U.S. rate their experience as mediocre, with an average score of 59. While many organizations are working to improve the onboarding experience, the survey findings point to a gap in new executives' expectations and subsequent experiences. Fostering trust among leaders, staff and board members through work-culture acclimatization, reiterating priorities early on and adapting to new virtual considerations will be key in helping the executive start off on the right foot. This discussion will highlight the essential considerations before day one, in the first 30 days, throughout the leader's first quarter and beyond.

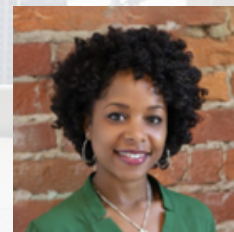
Hear specific insights from Impact Search Advisors on:

- Connecting the dots between the search experience, the onboarding experience and retention
- Collaborating with your recruiting team (whether internal or external) to ensure a smooth transition
- The importance of a clear strategy for internal and external communications
- Best practices to ensure a high-touch approach during the orientation stage

SPEAKERS

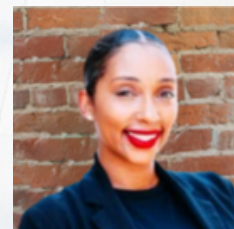


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Former Managing
Director,
Impact Search
Advisors



Danisha Martin
Senior Consultant,
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[See Danisha's bio.](#)

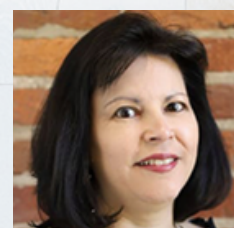


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Alicia Schoshinski: Good afternoon, everyone, and welcome. Thank you for joining us today for Nonprofit HR's Virtual Learning Educational Event. Today's session is entitled Onboarding Your Nonprofit's C-Suite Executive: How to Make a Lasting Impression. My name is Alicia Schoshinski, and I'm the Managing Director for Talent and Development at Nonprofit HR, and I'll be moderating your conversation today. We have a lot of great content to cover, so let's get started.

Today you're going to walk away with a solid understanding of how to create a stellar onboarding experience for your next executive hire. But let's go over a few items so you know how to best participate in today's event.

You've joined the presentation listening using your computer's speaker system by default. But, if you'd prefer to join over the telephone, just select telephone in the audio pane and the dial-in instructions will be displayed.

You'll have the opportunity to submit text questions to today's presenters by typing your questions into the questions pane of the control panel. You may send in your questions at any time during the presentation, we will collect these and answer some during this session, but we'll also have a Q&A session at the end of the presentation.

Today's session will be recorded, and you will receive a follow-up email within the next few days with a link to view the recording. You'll also receive some assets and live webinar attendees will receive codes for SHRM and HRCI recertification.

And now let's talk about today's presenters.

Danisha Martin is an executive recruiter and trusted advisor on the firm's retained executive search engagements through Impact Search Advisors. Danisha's experience spans search, talent acquisition and human resources. Danisha has successfully managed the staffing and recruitment needs for clients ranging from small and mid-sized operations to Fortune 500 organizations in both the for-profit and nonprofit sectors. She is gifted in assessing talent, adept in relationship-building and known for her professionalism and creative strategic approach.

Jami Armstrong serves as a trusted advisor on search engagements nationally. This includes being responsible for the successful closure of search engagements at the professional and executive levels, using unique search methodologies and strategies. Jami's experience spans corporate recruiting, agency recruiting and client relations in several industries and sectors, including for-profit and nonprofit organizations, government contracting and international development.

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And now, we'll hear from Myra Briggs, Managing Director for Impact Search Advisors by Nonprofit HR, or ISA.

Myra is going to kick off our discussion by sharing a little information about what ISA has been up to and why today's topic is absolutely essential. Myra will also join us for the Q&A session. So, please prepare to add your questions to the chat panel later on. So Myra, now I hand it over to you.

Myra Briggs: Thanks so much, Alicia. It's a pleasure to be here with everyone today, and we just want to thank you for taking some time out of your busy schedule to spend some time talking about this very important subject, onboarding your C-suite executive. But before we get into that, I want to tell you a little bit about Impact Search Advisors.

You may be hearing the name and wondering, is it a new company or is it the same thing as Nonprofit HR? And the answer to both of those questions is no, and then, yes. We are a program of Nonprofit HR, which encompasses the entire client-facing search function of the organization. We work on executive search, as well as professional search, recruitment outsourcing and interim leadership. So, whatever your needs happen to be around talent acquisition or recruitment for your nonprofit organization, we're here to help.

We still have the full backing of the 20-plus years of experience as Nonprofit HR, as well as all of the subject matter expertise that comes along with working with the rest of the firm and the rest of our subject matter areas. Let's jump into what we're going to talk about today.

One of the places where I started when working on Nonprofit HR was within the executive search practice. And we spent a lot of time, and organizations spend a lot of money, hiring new executives. One of the things that they very frequently forget to prioritize is the onboarding of the new C-suite executives. Onboarding is so vitally important that if you ever ask a person when they're getting ready to leave an organization whether they had a positive experience or a negative experience, chances are that they're going to talk to you about their first day in the organization. And it is up to you to make sure that it is impactful and leaves a nice, firm foundation for successful tenure in the organization.

Let's talk about investment. If you have employed a firm like Impact Search Advisors by Nonprofit HR to assist with your executive search, you have invested not only your time but also your resources in ensuring that you are able to secure the right executive for furthering the mission of your organization.

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Think of successful onboarding as an investment protection activity. You want to make sure that the new leader that you bring on knows your organization, knows where some of the land mines might be, but more than anything else that they feel welcome, they feel engaged and they feel a part of the team.

My team today, Danisha and Jami, is going to spend some time going through some best practices, and also exploring some of the ways that you felt about your onboarding practices.

We encourage you to submit your questions throughout the process of the webinar as well as at the end. And we're looking forward to an engaging and collaborative discussion on such an important topic. Ladies?

Jami Armstrong: Thank you so much for that lead in, Myra. I'm really excited to be here and to talk to you guys today about how to make a lasting impression when onboarding your C-suite executives. But before we get into some of the content, I'd like to talk a little bit more about Danisha and myself.

I am Jami Armstrong, as mentioned and I am coming to you guys today out of Bowie, Maryland. I identify with the she/her/hers pronouns series and, as earlier mentioned, I am a Search Consultant with Impact Search Advisors by Nonprofit HR. So, Danisha, you and I have talked a little bit about what brought me to the organization, but tell me what made you say yes to Impact Search Advisors by Nonprofit HR?

Danisha Martin: That is a great question, Jami. And first of all, thank you to Alicia and to Myra for setting this up for us. It's going to be a great conversation, and I'm really happy to be co-hosting with you, Jami.

So, by way of introduction, my name is Danisha Martin. I use the she/her/hers series pronouns. I have been at Impact Search Advisors since February of 2019, so a little over two years. I think we can say about five years because COVID years are like dog years, right? I think total, we're right around five years now. Anyhow, I've been working in search and talent acquisition for a while. I'm calling in from northwest D.C., so if any of you are in uptown, I am your neighbor. And as a quick location acknowledgment, I would like to say that we want to acknowledge that Washington, D.C. is the traditional territory of the Nacotchtank, the Anacostan and the Piscataway Indigenous people.

But we also want to acknowledge that there are generations of African peoples that were brought to this land against their will and do not have the privilege of acknowledging their land of origin, so thank you for the space to acknowledge the land.

But back to your question, Jami, why did I say yes to ISA? Well, it's the representation for me. If I'm honest, having an opportunity to meet Myra in action, having an opportunity to meet our Managing Partner, Patty Hampton, and having an opportunity to meet the very impressive Lisa Brown Alexander. Seeing these women of color in this corporate environment doing what they do was just phenomenal for me and quite frankly, an example that I had not seen before, not to that level. So, I saw myself in the leadership and I could see a clear path to my own development and career pathing. So, that's part of why I said yes; it's one of the biggest reasons why I said yes.

Now I'm going to ask you, why did you say yes to Impact Search Advisors?

Jami Armstrong: I'll share your sentiments. As I mentioned earlier, I come from a number of different industries and in the current climate of our country, it was just a really exciting time and opportunity for me to be a part of working with an organization that is working with other very mission-driven organizations. I find that to be a lot more satiating, like I said, based on the climate of our country and just me, personally. So, I'm really excited to be here, excited I said yes and excited to be co-hosting this with you today, Danisha.

So, moving right along, we're going to do a self-reflection exercise where we're going to talk about our best and worse onboarding experience. We are going to ask for some participation from our attendees, and we're going to ask that you share with us just in one word, how did you feel with your least favorable onboarding experience?

I know there's a lot of you, so we'll give you guys a little bit of time to think about that and participate. But while our attendees are thinking, Danisha, what's your one word?

Danisha Martin: Only one?

Jami Armstrong: One word. I know that it will pain you, but one word.

Danisha Martin: OK, well, I'm not going to choose a four-letter word, but one I would say "frazzled" to be honest.

Because for me, just to add some context to that, when you're starting a new job, it's like moving. You know how discombobulating moving is? Nobody likes to move.

Now, starting a new job in a new firm can be very exciting, but if when you arrive or even in the days leading up to your arrival, no one's prepared for your arrival, you don't know where to make a copy of something, where the bathroom is for crying out loud and then, let alone, all the cultural nuances that are going on in that environment. And, unfortunately, I have had an experience where those things were not thought through strategically, and so, a week, two weeks, three weeks in, I just felt frazzled. I felt frazzled and it wasn't the best starting point.

I'm curious, Alicia, and I'm not sure if you're getting any audience participation, I hope that you are, can we check in to see if there is any one word that would come to mind for the 70 plus people that are on the line right now?

Alicia Schoshinski: Yes, Danisha. We do have one so far, somebody mentioned “displaced.” Oh, here comes another one, “disoriented.”

Jami Armstrong: It's kind of like pulling up to your new house and not having the keys.

Danisha Martin: That's it. That's absolutely it. Wow.

Alicia Schoshinski: There was another one that was “unprepared” and “unwanted.”

Danisha Martin: Absolutely. That's a tough list of words. I mean, I don't think that any of us on the line who represent employers would be pleased to know that our new talent comes in feeling those things. Jami, what would you say is your one word?

Jami Armstrong: I would probably say my one word would be “disappointed” because, to your point, it's a big move. It's a big adjustment and you want to know that everybody that was a part of that move and that adjustment was on board and prepared for what that looked like.

So, it sounds like at least you and I and the two attendees in the chat that participated have experienced that. We've certainly heard some horror stories, but we've both discussed great onboarding experiences, and we've had some conversations with clients and candidates that have had really good experiences. So, I'm going to ask if the attendees, maybe a little bit more than two this time, will take a moment to think about a time when their onboarding went well, and then type in the question section one word that made you feel good about your onboarding. And while our attendees are dying to participate with us today, I will ask you, Danisha, what's your one word?

Danisha Martin: Well, for this one, the one that comes to mind first is “welcome.” I know that might seem like a word that is not that important when it comes to the work environment or your corporate lifestyle, but I would differ. We spend the majority of our waking hours, if we're fortunate, at work. And so, being able to say that you feel welcome is important.

I remember arriving at Impact Search Advisors by Nonprofit HR, and people saying to me, “Welcome home.” And I just felt like, wow, that is really different. That's really nice, and I did feel welcomed home because of the strategy and the thoughtfulness that went into my onboarding and my acclimation experience.

Alicia, let me check in with you. Are you seeing any positive words about positive onboarding experiences?

Alicia Schoshinski: Yes, and Danisha, before we do that, it just took a couple of minutes for people to get things actually in the questions box. We did get a lot of other responses to the question about the negative experiences. I was just going to read a few more words before we talk about the positive.

People mentioned, “overwhelmed,” “rushed,” “afraid to ask stupid questions,” “unseen” and “troubled.” So, there were a lot of good ones there.

And then, on the more positive side, people said, “excited,” “welcomed,” “necessary in a positive way,” “appreciated”—that was mentioned a couple times—“inspired” and “valued.” So, those were the key ones that came through.

Danisha Martin: Wow, that's fantastic. Thank you for going back too because it really does paint quite a picture of just how powerful a negative versus a positive onboarding experience can be. So, of course, I want to check in with you, Jami. Tell us about your best onboarding experience to date.

Jami Armstrong: So, my one word is probably going to be “impressive.” To date it was my onboarding with Impact Search Advisors by Nonprofit HR. And I chuckle because this isn't a plug because Myra is listening, it was really just an impressive onboarding experience, and I felt that everyone in the company, even the groups and the departments that I don't touch or work with, knew that I was coming. There had been some dialogue about me joining the team leading up to that, it was evident. Obviously a lot of us are operating in a remote environment, so all of my technology was delivered long before my first day. Leading up to my first day I had a detailed agenda that covered over about four weeks' worth of orientation and just getting me acclimated and familiarized. Our President & CEO actually sent me a Starbucks gift card, so I have been enjoying a lot of Starbucks throughout the course of the pandemic.

So, in addition to all of the other things that I shared before that, that was a really nice touch and the cherry on the top. And it was just a really great start to a new opportunity.

Danisha Martin: Wow. I know you said that it wasn't supposed to be a plug, but it almost sounds like a commercial. As somebody who's been here for a couple of years, that is the experience that we're laying out. And hey, since we're on the subject of a commercial, we do happen to be hiring because Nonprofit HR is growing. So, I'm just putting it out there into the atmosphere.

But, in all seriousness, do you want your new employees to feel that first list of words that came through that Alicia read out, or do we want them to feel the latter?

Jami Armstrong: Well, I think, it's the latter. And, it was nice, the way Alicia ended up having to present that because we really got to see negative to positive side-by-side and how they are pretty significantly contrasting. And I think that, like you said, anyone that is involved in employment would like for their new employee to fall on the more positive side of the list. So hopefully today, when Danisha and I are all done, you all will feel you have some really good insight on how to make a lasting impression onboarding your C-suite executive.

With that being said, I am going to go over the agenda. We're going to talk about what this looks like before day one. We're going to talk about what it looks like within the first 30 days, 30-to-90 days, beyond 90 days and then, an opportunity for a question-and-answer session. So, with that being said, I am going to pass it to you, Danisha.

Danisha Martin: All right. Well, I appreciate it.

It's funny because oftentimes when you think about onboarding, the temptation is to think about that first week, and we'll make sure they know where everything is, make sure they have whatever equipment they need and then, we'll move on and they'll hit the ground running. But, as you said, onboarding starts before the person ever opens the door of the office building or, as it may be, before they ever log on for the first day of their virtual telework experience. And I think it might be a helpful discussion, Jami, if we just outline what the difference between onboarding and orientation is, because I think a lot of times it's used interchangeably, and there are some nuances. So, let's talk about that.

Onboarding is literally the overall process. So, when I think about onboarding, it's the full umbrella of everything that it requires to build engagement from the very first contact with the employee until that person becomes truly established within the organization.

Now, orientation, on the other hand, is a stage within onboarding where your new employee is going to learn about the company, learn about their job responsibilities and learn where things lie, whether physically or virtually. I remember, a big part of my orientation was how to use Dropbox, how to use the shared file system, how to make sure everything was syncing. All of these things are part of orientation, because it is a stage within the overall onboarding process, but the onboarding process literally starts before you ever arrive and goes well beyond the first 90 days, which, again, it's not necessarily intuitive.

So, now that we have that clear, let's go a little bit deeper into that time before your executive leader arrives. One thing you want to remember is, in human resources, there's this difference, this nuance, between treating someone as a human resource and treating them as a human. One thing that is helpful to keep in mind—especially everyone, but I was going to say especially for the smaller nonprofit, who may not necessarily have the longest, largest budget and runway to do all the bells and whistles—is to think about this experience the way you would think about a very important person coming into your home for the very first time.

For instance, in my family, a very important person might be in a Michelle Obama-type of person. If I'm aware that Michelle Obama is coming to my home, I am not starting the preparation for that the day that she's arriving. I am months in advance preparing for Michelle Obama to arrive at my home. And so, when you think about, as Myra said, the investment into the search, whether you did it internally or whether you did your search with a partner, like ISA for example, either way, the investment of time, the investment of capital, is significant. And so, you want to help take your new leader from candidate status to a fully integrated executive leader within your organization. So, this requires high-touch, or what we like to say, red-carpet treatment—essentially a very warm welcome. What that might look like is some of the examples that you gave, Jami. I love the Starbucks card, or a card to JusTea, which is a wonderful fair-trade tea organization, or whatever it is that the person enjoys. Maybe a week's worth of DoorDash, so that they don't have to be encumbered thinking about food while they get acclimated. Maybe there is a swag bag or a nice, little merch basket where you've got the logo of your organization on things like thumb drives, pens, a notepad and just a couple of different office items that are very welcoming, and that align with the job responsibilities.

Another way to present a warm welcome is that human touch. Right now, things are starting to open up, but it's a little nebulous, and also, depending on your organization, it may be spread out across the country. But if your organization uses platforms like Zoom, Slack, Teams and such, encourage your existing staff to pop in on your new executive, and say, “Hey, I know I don't have a scheduled time, but I just wanted to leave you this message. I just want to leave you this note to say, we're so happy to have you. I cannot wait for our first formal meeting, but I'm just so excited, I want you to feel welcome, so I'm saying hello.”

Those kinds of things go a long way because, again, we're talking about human beings, not just in the framework of human resources.

Next, the questionnaire. So, this is something that I've seen done at an organization that just blew me away. What they did is in their initial welcome packet, which was a beautiful bouquet of flowers, Jami, they had the Starbucks card, they had all the little merchandise and swag gifts with the logo, they had all those nice things. And they had a hand-written note from the team that said, "We're so glad to have you as our new Executive Director." But in there, they said, "If you would humor us and fill out a few of your favorite things," and I'm dating myself, but one of my very favorite movies is *The Sound of Music* and she sings this song. Well, anyway, the questionnaire was a list of the favorite things. And what it did, Jami, is that it equipped this organization to recognize and celebrate their executive in their own love language of their favorite things. They knew where they liked to go to lunch; they knew where that person thought the best pizza was served; they knew where that person like to spend time outside of work and what they like to do with their family; they knew their favorite candy bar; they knew all of these juicy little tidbits, so that along the way, they could just shower little things on their executive. And that goes such a long way, so consider that.

The meet-and-greets are kind of out of order. But, again, in this virtual environment, use the tools. I do enjoy when colleagues pop up and ping me on Zoom, and all I have to do is join and say, "Hey, Jami. How are you? I'm so glad you stopped by my virtual door today. What's going on with you?" And we can have a little chat. This is a wonderful way to make your executive feel welcome, especially if they are in a virtual environment. We have people in our firm who we still have not met in person, and Jami, you and I can attest to that. So, those are a few great ideas and best practices that I've seen.

Some other best practices on the next slide include some of the box checking that needs to happen. So, if we'll go to the next slide, I'll share with you the pre-hire documents, manuals and pre-reading.

Think about it like this, when you are starting your new opportunity and it's not virtual, on the first day or prior to the first day, you get your paperwork stack and you show your ID for the I-9, and I'm talking to HR folks, so y'all know what I'm talking about. You have to do all the things, you have to bring out your insurance card and fill out all the things. You can put all of that on thumb drive, share it with your new executive and even give them a couple tips about, "Hey, here are some apps that we'd like to use to make life easier. You may want to upload XYZ app, which is a scanner that you can just use your phone to point and shoot, and then send these back to us signed." Give them the keys to the city, so to speak, so that your executive is not scrounging around trying to figure out, do I need to go to the post office to get this back to them?

That might make it clear what those lines of communication are and what those lines of producing those kinds of documents are.

If you got manuals and all kinds of pre-reading, maybe some white papers, that really helped to frame who your organization is and how they are seen and viewed in their external communities, send that all over on the thumb drive. And just say, "Hey, you know, I know it's a month out, or three weeks out, or two weeks before you start with us. But I thought if you were curious or were looking for some centering around your first day and your first couple of weeks' experience with us that this pre-reading might be helpful."

You can do the same thing with the technology toolkit. Jami, how soon did you have your workstation before you started?

Jami Armstrong: I want to say a week.

Danisha Martin: A week before? That's fantastic.

And, at the same time, the software, the home office workstation, I remember it wasn't exactly a part of my onboarding, but if I had been new at this time, Nonprofit HR rolled out a program where we receive \$100 toward our home office needs, and there's nothing to fill out. Literally, you just see it on your pay stub as a credit, and it's such a wonderful benefit. It really feels like a loving care because when you go to Amazon or wherever you go, and you have to get another couple of reams of paper or ink or whatever it is that you need, you know that you have that little cushion that your employer provided for you. So things like that, make them plain in your welcome packet and say, "Hey, you may not have had a chance to go through the entire workplace policy, but one perk we have is this."

And then last, but absolutely not least, please, please, please think carefully about the communication strategy for your new executive. They will need a professional headshot. They will need a well written bio. They will need a press release. And it's kind of painful after they go through a really rigorous vetting process that on the other side of that, a week goes by, two weeks go by, three weeks or god forbid a month goes by before anyone in the external community knows that they exist.

So, a best practice is once they sign on the dotted line, go ahead and send them the template for the bio. Send them the template for the press release. Get a quote or two from them and that way you can draft it out, get their approval and then those documents can go out and hit the airways on day one or certainly by the end of the first week.

These are just some things that can be helpful. I've even heard of, and I think this is phenomenal, an executive, leading up to before their day one, someone met them out in the park with their iPhone on portrait mode and took some beautiful headshots of them because they didn't have a good headshot. Why didn't they have a good headshot? Because it was their very first executive director role. They never needed one. Their LinkedIn was them in their cat or something like that, so someone facilitated that process and that felt like a little TLC.

Again, these are things that are well within the budget, no matter how big or how small that budget may be. And hopefully, our audience members took a couple of tips from what can happen beyond, or rather before, that person ever comes through the door. I'm going to hand it off to you, Jami, to take us into the first 30 days.

Jami Armstrong: Before we move on from the Before Day One portion, I just want to point out that a lot of the things you shared are not labor intensive. They don't require a lot of effort, they require a lot of thought. And, I just want to point out that the return on the small investment is going to be huge, so, definitely worth it.

So, I am going to take us beyond day one and go into the first 30 days where we're going to talk about how to get your new executive acclimated to the role, the staff, culture and ways to support them in establishing credibility and relationships. Let's talk about some best practices.

The first best practice that we're going to talk about is encourage your executive to take their time. These are typically high-performing professionals, and they are anxious to come in and hit the ground running.

You want to encourage them, again, to take their time, give themselves an opportunity to really dive into the culture, give themselves an opportunity to get to know everyone, to discover where all the tools are and how the tools are to be used within the first month. All in all, you want to encourage them to pace themselves. Relationships at that level are going to be important, and we want to leave space for our executive early on to build relationships. A DEI tip is to remember that your leader might feel additional pressure to perform, so you want to communicate to them that they have the margin to center relationship building first.

Another thing that you want to talk about within the first 30 days with your executive is hot issues. An example of hot issues might be a key staff member that maybe is looking or is interested in transitioning out. There may be funders that are threatening to leave or discontinue their partnership. You may have lease needs. Your lease may be ending and you may be looking for new space. Just really anything that is going to require the executive's attention within the first 90 days.

You may be tempted here to talk about priorities and measurable goals but obviously, opportunities for deeper discussions around that will come later. Our DEI tip for that piece is if your organization has endured any trauma related to racial injustice, be sure to address this head on with your new executive.

Within the first 30 days, you also want them to be comfortable and versed on HR and workplace policies and compliance, that's pretty self-explanatory there. You also want to make sure that you have talked to them about programs, projects and a day-to-day overview, so they have an idea what they're getting themselves into. The next piece is a technology briefing. Our hope is that briefing is on the heels of the technology toolkit that was provided, that Danisha shared. It should really be designed to provide a high level of just initial familiarity with critical systems and procedures, and they're going to be crash courses. But they're going to support your new executive just by giving them a general technological lay of the land.

Something else Danisha and I talked about are executives being assigned technology buddies. This is ideally someone that is officially or unofficially someone that's versed on the way the organization uses technology. The next point is introductions to staff and board. You want to facilitate the scheduling, so that the executive can engage staff early on. Remember, we talked about the importance of relationship building in this role. This is going to be informally and formally. They are going to want an opportunity to begin assessing the strengths and opportunities of their team. This is a great time to start those introductions. And, it's also going to give the executive an opportunity to lay the foundation of mutual trust and really, an opportunity to establish some synergy. This could look like coffee meetings, virtual happy hours, virtual town halls as well as all staff meetings.

Another similar point is within the first 30 days, you're going to want to facilitate introductions to external stakeholders. You want to schedule a formal meet and agree with the organization's most critical stakeholders—obviously, the folks outside of the staff—any advisory boards or membership communities that apply, external partners, funding partners and sometimes past leadership might even be relevant. So, a DEI tip: When you are scheduling the stakeholder introductions, consider representation when you are scheduling these meet-and-greets.

So, we have before day one covered, we know exactly what to do. We have a deeper dive in the first 30 days, and so next, we're going to move on to 30-to-90 days and beyond. But before we do that, I thought we should stop and check in with Alicia to see if anyone in the audience has any questions.

Danisha Martin: That's great, Jami, and while Alicia is teeing up any questions, I love just the way that you framed it. It's like, OK, Michelle Obama's coming to our home. And so, we're going to lay out that red carpet and everything's going to be super high touch and we'll have her favorite fragrance in a potpourri on the pillow of her bed. That's all before she arrives. But then once she arrives, we're getting a little bit deeper. We're making sure, she knows exactly where the kitchen is, where the bathroom is and where she can find it. So, using that analogy, we're just moving right on through that process there. Alicia, are you seeing any questions out there? Any submitted questions from our attendees?

Alicia Schoshinski: Yes, Danisha. There is one question asking about the role of the outgoing executives in the onboarding process. What is their role and how important is it for the current and the incoming executive to work together for a period of time?

Danisha Martin: That's such a great question. And the answer to that is yes and no, and maybe so. So let me tell you what that means. In some organizations, the previous executive is gone, has been gone and there has been a gap.

In any case, I think it's important to note that organizations don't always have a choice in the matter, that sometimes the position has been vacant for a while. And so, in that case, the working together needs to happen with the board. The board of directors needs to step in and help to fill in the blanks.

Also, the existing staff, no matter how small or how large the staff is, just like there's a technology buddy, there should be a programmatic buddy, or someone who is the go-to person for any questions that come up around programming or what have you. There should always be a liaison in the event that there is no outgoing executive available for those conversations. Now, there may be a situation where there's an interim that is there, and in that case, not all the time but oftentimes, interims, especially if they themselves were not an internal candidate for the role, if they were not looking to take on that role, they'll be more than happy to extend their contract to help make that a smooth transition. And oftentimes, interim executives themselves are consultants, so they're happy to do that kind of work. That's kind of their sweet spot anyway.

Now, in the case that it wasn't an interim, but it was an outgoing executive, and maybe they are moving on to their next new role, or maybe they're retiring, or whatever the case may be, it is important to be very clear on what the timeframe is, whatever the timeframe is. And not only that, but to check with the incoming executive, who may also have some ideas or feelings about how long that time should be. So, I've seen situations where the assumption was, "Oh, you know, they're going to want that kind of hands-on approach, and the person was prepared and willing to stick around for 90 days."

And the incoming executive said, “Hold on, that's a little too much. A little too close for comfort. All I need is three weeks, and then I need to be able to just give them a call if I need them.”

And so, I think what's most important to realize is that whatever you do in terms of that handoff, make sure that it's openly communicated, that everyone agrees to that timeframe, so everyone is familiar and aware of what the expectation is. I hope that's not a cop-out answer, but I really have seen it go so many different ways, Alicia.

Alicia Schoshinski: Great, thanks Danisha. And another related question is asking a little bit more about who has responsibility for each of the pieces that Jami described. These are all great ideas, but they'd love to hear about models of how each of the pieces are coordinated, including what HR's role in the process is.

Danisha Martin: I want to make sure that I caught the question. It's the ideas are great, but how do you implement? Is that essentially what's being asked?

Alicia Schoshinski: It's more so who implements them other than the outgoing president. What are the roles of everybody, such as HR, in that process?

Danisha Martin: Right, absolutely.

And I want to be sensitive to the fact that some nonprofits don't have an HR, also. So, I think, again, it's a conversation. So, there may be an office manager, there may be a pseudo-HR person or there may be a contracted HR person that can help to coordinate each of those steps and assign roles. There also oftentimes is what is called a transition committee, and that transition committee was very hands-on during the vetting and the selection process. They were privy to the interviews and all of those things, and that selection or transition committee can also be the group that is manning, in charge of or owning those pieces on the other side as well.

If there is no plan in place, what I would say is, look at your organizational structure. If there is an HR person or a contracted HR person, consult them so that you can lay out the steps and say, “Hey, I just got off this webinar, and I have all these ideas. I want to come to you and brainstorm these ideas and talk about how we implement it and who owns what.” If there is no HR person, look at who was part of the transition itself, who was a part of the interviewing and all of that. And then from there, you can strategize who will own putting together the swag bag, who's going to own sending flowers, who's going to own laying out what the first 30 days will look like, given the steps that we laid out. So, it really depends on the structure of your organization.

Jami Armstrong: And we tried to be really mindful and point out things that don't necessarily require you to reinvent your operation, really, just things that are evidence of thoughtfulness and preparedness around receipt of your new executive. To Danisha's point, it may require someone in the organization to put on a different hat, but this is an investment and you want to nurture your investment. It's like your new car when you park it all the way at the other end of the parking lot, you are taking care of your investment. Especially when it's shiny and new, you really, really want to keep it that way as long as possible.

Danisha Martin: That's great. Alicia, do you see any other questions in the chat that might be helpful?

Alicia Schoshinski: One quick one is: How early after acceptance of an offer letter should onboarding begin?

Danisha Martin: Oh, that's a great question.

So, I would say it's important not to let your newly accepted executive get cold. Oftentimes, what we see in search is that we are carefully bringing your candidate across the finish line in the midst of all manner of chaos, that could mean other agencies or firms vying for the attention and affection and acceptance of this candidate. They may have had to decide literally across two or three or even more offers. It's so funny, and I see this all the time, and I know, Jami, you'll cosign this: When it rains it pours. So, you'll be working with an executive and they say, "Hey, I know that I've got what it takes," and you know they've got what it takes, but things have been a little bit slow. And then, all of the sudden, your search picks up and whatever irons in the fire they have pick up. And so, now it's time to talk about the negotiation and they come and tell you what, Jami? I have another offer.

Jami Armstrong: You have another offer.

Danisha Martin: So if that's the case, you don't want your executive to have any kind of buyer's remorse, if you will, or I don't know what the appropriate term is. But if they accept it and especially if you're privy to the fact that they accept it over and above other employers, love up on them right away.

I mean, you can't smother them. It's OK to let a day or two go by, but I wouldn't let them simmer for a week untouched. Have someone call or have someone welcome them. Especially if it is your number one position, have the board president and the vice president or the board chair and the vice chair reach out and give them a call. You can do all the formalities as far as agenda setting and things of that nature, you can get all that on paper.

But just in terms of the human element, make sure that they're hearing from people, internally and externally, who are aware that they have accepted. Flowers are a great touch before day one, or at least the day that they start. And then, when you're going to lay out your actual agenda, it's nice that they can see the agenda before day one, so they can sort of center and wrap their mind around what that first week is going to look like. It's also great to say, "Hey, if there's anything we've missed that you are particularly looking forward to learning in your onboarding, we're open to revising, augmenting or editing this list. So, all of those things I would say are helpful when it comes to timing, but for instance, if they accept on the May 18 in their offer letter says they don't start until June 20th, you have a month to love up on them.

Jami Armstrong: And, I think that, to the attendees' question, one thing that you could do very early on, very shortly after acceptance—if I'm not mistaken that was the question—is the questionnaire suggestion. You could send a welcome letter and the questionnaire. That lets them know right off the top that you are in a headspace to receive them in a high-touch way, not just a welcome to the organization, but more of a welcome to the fold. What do you like? What is your favorite color? What are some of your hobbies? Just, again, that initial touch that lets them know that you are ready and prepared to receive them, and that you are interested in them as a human, not just a human resource.

Danisha Martin: That's it. That's it.

I'm sure that more questions will come in, Alicia, but what we'd like to do if it's OK is plow forward, we have a bit more content to discuss.

So, what happens in 30-to-90 days? And then, what happens beyond 90 days?

This is the section, and I love what you said in our off-camera conversation, Jami. This is really taking things and shifting from that orientation frame of mind to integration, and really, to your point, bringing this executive into the fold. And so, what are some best practices around this piece?

One, and I love what you said a moment ago about how your new executive is going to have the whole rest of their time with this organization to perform. So, that first 30 days really needs to be centered around relationship building, getting the lay of the land and making sure that they know that they have the margin to just breathe it in, rather than come in and start working right away. At some point, your executive is going to feel restless with that because they are a high-powered executive for a reason. They are an implementer. They are a doer. They get things done. And so, you'll want to make sure that in this 30-to-90-day period, you're setting that process and that transition up for success.

What I always suggest is, bring back out the job description, bring back out the job announcement, and use that to center what are the priorities of this role. It's so funny. It can get watered down with round one and then round two and then round three and then round four and then round four B. And by the time you're at the end, and you sign on the dotted line, it's like, now what did I agree to?

So, it's good to say, "You know what, I hope you feel welcome by now. We know your favorite color and everything. Let's pull this job description back out, and just put some context around it. You have the hot issues list from last month, but we really want you to now shift into, in the next 6 to 12-to-18 months, these are the priorities as we see it." And who's giving that information? It's the board, because the board has done the strategic planning and the board knows where the organization is headed. And so, you want to start aligning around the priorities of the role and include what's urgent, what's important, and what's urgent and important.

And so, the next step from there is really to solidify those priorities into measurable goals and into performance metrics. One of the questions that I never do not get—in other words, I always get—when I am prospecting for an opportunity is how will my performance be measured? Because the thing here is, if it's a moving target or a nebulous target, or a murky target, then how will anyone know if I'm doing well? And if no one knows if I'm doing well, how will I ever be rewarded? Or on the converse, then I'm going to be held accountable to something that is not even defined.

So, this is the time in these 30-to-90 days and sometimes, it is a discussion because you may be in an executive search at a time where there's some flux or there's some change or there's a global pandemic for crying out loud and things will shift. And so, when you bring your executive on, it's really important to center where all of this is landing.

Remember that performance is the love language of your executive. For those of you who are tracking with me, you know that there's physical touch, that words of affirmation and quality time and giving gifts. And there's one that I can't think of right off the bat, but anyhow, for the executive, their love language is performance. And so, you want to make sure that they are clear, again, on those measurable goals, that they're clear on the timing, that they have that thing crystal clear, so that they can deliver because your executive wants to deliver.

Here's the DEI tip: Please remember that some leaders are going to feel an added pressure to perform. It's just a part of it. It's just a part of being a diverse leader in the space, and so you want to set them up for those clear goals. That's another conversation for another time. But trust me when I tell you, especially if your organization is bringing in their very first diverse leader in the history of the organization, there's a lot of added pressure where that's concerned and there are a lot of eyes on that person and they're going to need to feel that support.

So, now on to additional best practices in these 30-to-90 days. Sometimes, we'll find, especially with our smaller nonprofit organizations, that there is no current administrative support for that particular seat. And, it's not always necessary, but sometimes it might be necessary for a time, especially while your executive is getting the lay of the land, especially when there are tons and tons of meetings, both internally and externally, et cetera. And so, consider that. Consider hiring a contracted administrative support professional within the first 30 days and keeping that person on for 90 days to six months or so. And if it works out well, then maybe they come on full-time. If that is not in the budget, then that can be the expectation upfront. Oftentimes, and I highly recommend, that your executive is the one to hire their full-time chief of staff or their full-time executive assistant, but just the offer of saying, "Hey, we do have in the budget to bring on someone who can support you from an administrative perspective while you're getting everything organized," is very welcome. Very welcome, indeed.

And this next one, which might be more overlooked than people think, Jami, is to be accessible and be responsive. And this is really a note for the boards of directors because what happens is, maybe you're in a board that is contracted to meet four to six times a year. It's a super governing board, it's very hands off, the last executive had it and they didn't have to do a whole lot. But now there's a shift. There's a transition. And so, there has to be conversation about, what might we need to do as a board to rally around this person and make sure that they have what they need? And that's where the buddy system comes in, which I love, which you brought up from the first 30 days. But that should go on. That should continue because this person is still forming, storming, norming and getting an understanding of where your organization is.

Jami Armstrong: And Danisha, would you agree that this is probably that much more critical in this virtual environment?

Danisha Martin: Oh, my goodness.

The thing that's so funny about it is that if you're in an office, it probably could take longer because maybe someone left the building or someone's doing this or doing that. But in reality, it takes longer in the virtual because you've got an inbox of 250 unread emails, you continue to decline whoever is pinging you on Zoom live and the next thing you know a week has gone by and a very quick question, which should have been a quick question, is still left like a dangling participle.

So, it is extremely important to remember to stay responsive and stay accessible. One of the things that I love to do is voice texts. Jami can attest to this, she'll ask me a quick question over text and I'll respond on voice text, because it's a little bit faster and a little bit easier, and I know that I'm getting her the information she needs. But I can continue on the flow of whatever I'm doing. So, technology can help us to be accessible and to be responsive.

This last point is interesting, and again, this goes back to viewing your executive not as a human resource, but as a human. If this is now your new CEO, this is now your new executive director, this is now your new chief financial officer or whoever, you really want to make sure that you're actively edifying and speaking highly of this person out loud in front of and behind their back. Essentially, you want to brag on this person behind their back because what's happening is everyone is uncomfortable with change. And so, when the new person comes in, if there is a felt absence of excitement from your organization, about this person coming on board, it starts to trickle down and they will start to feel it in various interactions.

The DEI tip is for your new leader, you might want to be prepared to speak truth to power because that will come up. That's not going to be a relevant point to everyone on the call, but there are some organizations on the call right now who know exactly what I'm talking about.

Coming through everything with the summer of 2020, many organizations wrote their DEI statement. Now it's time to walk the walk. And so many are saying, now's the time. We want all things to be equal. We want to make sure that the leadership reflects the communities that we serve. And now that we've done that, this is new for everyone. There are going to be some conversations that are also new for everyone. And so, if your leader is coming in, and they are prepared to speak truth to power, you want to be prepared to edify and back that up.

All right. A few more things to keep in mind. To round out this discussion on orientation to integration, these 30-to-90 days, which is really one of the meatiest stages of onboarding is this 30-to-90-days piece. Oftentimes, we are tempted to hold feedback until the annual review, or we're tempted to hold feedback until the half year review. Please do not do that with your new executive. You'll want to provide informal, positive feedback as you go and timely, constructive feedback. If you come out of a meeting and you know that they didn't quite strike the chord of the feeling in the room, and they didn't strike it because they don't know those people just yet, it is perfectly appropriate to say, "Hey Jami, do you want to grab a quick coffee or tea? Let's just debrief that meeting, how do you think things went? OK, great, I agree that part went well. Let me tell you some things that you may have missed or may not have been able to read the wrong given that you're new," and just tell them. They will appreciate that kind of candor so very much.

Also, allow your new executive the space to manage staff in their own way. We see this all the time, don't we, Jami? That the new executive comes in and whatever that transition was, had that board as an operating board and...

Jami Armstrong: I was going to say when there was a gap.

Danisha Martin: Yes, there's a gap and people are calling the board chair and they're calling the head of this committee and they're saying, "We need this" and "That needs to happen," because there was no CEO or executive director in place. But now that there is, it can be so tough to untangle or disentangle that entanglement.

So, you really want to help to gently turn the staff back to your new leader and say, "Hey, I know three weeks ago before Jami joined us as our new executive director, it was appropriate for you to give me a call. But please go ahead and give her an opportunity to hear your concern, or to ask that question and so on." If Jami doesn't know, Jami is going to get the information from the board. Let's not cut out the new executive, but it takes the board to direct staff back to the new executive to allow that to happen.

And last, but absolutely not least, ask what you can do. How does that quote go? "Ask not what your country can do for you—ask what you can do for your country." It's just like that. Ask what you can do to support your new executive and be specific, especially if you've noticed an outage somehow. For example, they went before the finance committee or the fundraising committee, and maybe they missed a few points. So then, you'll go back and say, "Hey, Jami, how did you think the meeting went? Great. I agree, this part went well. One thing, I was curious, could you use some support in understanding all of the different revenue streams? I noticed you hit the grant piece really hard, but didn't spend that much time on the major donors," or whatever. I'm just going off the top of my head. But be specific in the ways that you might be able to offer some support.

The DEI tip here is that it is not uncommon for an incoming leader to request a cultural assessment. If they go through this vetting process and they uncover that they are the very first person of color in a leadership position in this organization, that is going to make someone's Spidey-senses go up and they may be interested in a cultural assessment. If they go through the vetting process and find out that the last five people to leave the organization were persons of color, that antenna might be going up.

Be open to that. In fact, if you know that your organization is coming through some emotional or professional trauma in some way, you can even be the one to consider offering this sort of support. This sends a message to your new executive that you have your finger on the pulse. It's not that we're not woke, we're woke, but now that we're woke we're seeing what needs to be done. We're seeing what needs to be shifted, and we are completely all hands on deck to support that change, rather than sitting back and just letting them have to come up with all those ideas. It's OK to go to them and say, "Hey, one thing we were thinking might be helpful is some sort of a DEI assessment, so that we can get things back on track. So, those are some of the ideas, again, the best practices that we've seen occur in that 30-to-90-day period, and the story's not over, right, Jami? The story is not over. What happens next?"

Jami Armstrong: It is not over, so I was really excited to do the next part.

This is where you really take another step in protecting your investment. This is typically, I think, culturally in the HR and onboarding space, where we feel like this process is over. I'm not sure who came up with the first 90 days, but it's been the case the entire time I've been a professional. But the objective of today's webinar is not to just give you insight on how to onboard your nonprofit C-suite executive, the key piece is that we want to make a lasting impression. So, in addition to protecting our investments and setting our new executive up for success, we absolutely are approaching this in the spirit of making a lasting impression.

So, we are beyond 90 days, and we are still onboarding our executive. What does this look like? This looks like a few things noted here on this slide. One of them is training opportunities. An example of training opportunities would be, let's say you hired a certified association executive rather than someone who is specifically a subject matter expert within your organization's actual programming. You are going to want to provide training opportunities for this executive so that they can get up to speed quicker, feel confident and be able to speak knowledgeably about the organization's programs in the way that it executes its mission.

Another consideration beyond 90 days is going to be executive coaching. Executive coaching can look like a number of different things. It could be coaching on emotional intelligence, time management, managing change, delegating, communication, self-confidence, imposter syndrome or decision-making skills.

Either way, you're going to want to center this executive coaching around developmental areas that you identified maybe in your vetting, or maybe that you've identified through staying close to your executive in the first 90 days. Impact Search Advisors by Nonprofit HR actually uses a really thoughtful assessment through simple, accurate scientific methodology. This assessment allows us to know and analyze behavioral profiles of executives, and this is something that we really encourage our clients to use. I feel like, Danisha, you had a recent example where you used our assessment.

Danisha Martin: Yes. That's true.

It's funny because prior to joining Impact Search Advisors, I was very familiar with some, like DISC, Myers-Briggs and StrengthsFinder, which is one of my favorite indexes to use. But the one that we use here is called the PDA, and essentially what it does is it identifies the leadership style that comes most naturally to your executive. And so, for instance, maybe one spectrum is that this person is an implementing leader, but another type of leadership style would be a change agent leader.

So, if I'm looking at your index, for example, Jami, it may say that she's 91% on the spectrum of an implementing leader, meaning it comes super easy to you, that's your natural behavioral style. But when I look at the profile that shows up for you as a change agent, maybe that's only 30%. So, can you be a change agent? Absolutely. Have you been a change agent, 100% yes, but does it require more effort for you to do that work than it does for you to be an implementing leader? That's the question. So, that's the genius of this particular index is it's showing you, especially across different candidates, if you choose Danisha, this is the natural behavioral style that she leans into. And it takes more effort for her to do this style, which she also does as evidenced by resume, interview, cover letter and references. Versus, if you choose this leader over here, Jami Armstrong, this is the kind of leadership that she naturally leans into.

Why is that important with onboarding? It's important because, if you had a choice between, in this example, an implementing leader and a change agent, but you know your organization needs both, then you're going to want to set up your, previous candidate, now new leader for success by saying, "Hey what kind of coaching or training might be helpful?" And you're using the references, you're using the behavioral index that you choose, you're using all those things to inform those areas that may require extra support, delegation, training or what have you.

What's beautiful about this when done properly, is that your executive is coming into an environment where they are being poured into immediately. Because it's not punitive, I mean, they've just started. This is not punitive. It's literally developmental, and it's a question, "Hey, Jami, we noticed in your references, in your behavioral index, that you might require some support around delegation. What can you tell us about that?" And you might say, "Oh, I'm so glad you asked. I am constantly taking on more than I can handle. I would love to get some administrative support." Or, "I saw this course that taught some new way of approaching time management, and I'd love to be able to take that." Those are the kinds of dialogues that those indexes can really tee up for you.

Jami Armstrong: Absolutely. Thank you so much. For that example, Danisha. The last point, or the last consideration that I want to go over beyond 90 days, is in line with something that you talked about, feedback and open communication. The reason that it made this slide as well is because it shouldn't stop after the 90 days. You should constantly be engaging your new executive with ongoing feedback and creating an environment for open communication.

The DEI tip I'd say for this is be careful of gaslighting and be sure that you are supporting your new executive. The biggest takeaway that we hope that all of you take from this onboarding is more than welcome to the job. It's a welcome to the fold. You alluded to this earlier in the call, Danisha, that we spend more time with our colleagues in a lot of instances than we do with our family, and we want to make that a good experience.

It is going to slow down the executive search revolving door. It is also going to position you to strengthen your culture. And it's going to set your executive up for longevity and success. In understanding the investment that we've made on the front end, I think it's fair to assume that that is absolutely the goal to retain this person and for them to perform successfully.

Danisha Martin: Fantastic. Wow, thank you so much for all that information. We have roughly 15 minutes or so, that we can likely entertain additional questions. Alicia, I'd love to hear if there are any further questions and—oh, it's Myra.

Jami Armstrong: There is our fearless leader!

Danisha Martin: We'd like to address the questions of our audience, so back to you, Alicia.

Alicia Schoshinski: Yes, thanks Danisha and Jami, for all the great information you just shared. It's definitely been a power-packed and informative discussion. We have Myra joining us as well now and so, if there are any questions, please type them into the questions box, and the team will get to as many questions as possible in the remaining time. But, let me go ahead and start with some that have come in so far.

This question is about the outgoing executive and the role that they play with the incoming executive: What are the three critical things that an outgoing executive needs to do?

Danisha Martin: I'm going to sit my water and listen as our Managing Director weighs in on this one.

Myra Briggs: Alicia, we're looking for the three things that the exiting executive will do, that's correct?

Alicia Schoshinski: Exactly. The role of the exiting executive. Some top things.

Myra Briggs: Wonderful.

So, the first thing we want to be transparent about is that the role of the outgoing executive should really be dictated by the circumstances around their exit. How much they should be involved, for example, if this is the situation where they're retiring or they've given notice and it is a positive change, there's always a little bit of bittersweetness to it. But, more than anything, if it's a situation where there is no real negative reason to solicit the change, then you really want to involve the outgoing executive as much as possible. I don't know how much you want to involve them in the interview process, and we're not talking about that right now.

We are talking about the onboarding. You want to give them time with the new executive, give them some one-on-one time, so that they can really get into trenches and learn what it's like to be the actual leader of this organization.

You want to give them some time. And then, you also really want to create space for them to be transparent outside of that conversation. Allow them to be transparent with the board of directors, and let the board know, "These are some of the things that you all did that were absolutely fantastic and supported me. And these are some things that, if I could ask for a bit more and get it, this is where I think that you really need to lean in." You really want to listen in, and then the other piece here is, do not be overbearing on either the executives' time or resources. Whether they are rushing to retirement or to a new role, you don't want to bog them down with any more tasks that are already required by an exiting executive.

But then again, you also do not want to make the new executive feel impeded in any way around them being able to take on the fullness of their new role. And sometimes, that onboarding process can be a bit overbearing. I hear search committees quite often say that they've got 30 days of overlap with the outgoing executive and the new. And I just want each of you to think about, if you are an executive, or maybe not even an executive, whatever role that you're currently in, if you had someone sitting with you eight hours a day for the first 30 days of you doing your role, how would you feel about that? And I think it's also very important to ask for some insight into what the new executive feels like they need. So, you need some transparency from your exiting leader. You also need a bit of their time, but you also want to be very careful about making sure that their time is not only one-on-one with the new executive. Really listen to what they have to say about things that they needed when they were on board, so that we can improve experiences moving forward.

Alicia Schoshinski: Great. Thanks, Myra. Another question is asking about the staff's roles. They asked, do you have a session with staff on what they can expect with a new CEO?

Danisha Martin: I'll jump in there.

Sometimes I know attendees might come in mid-webinar, but there was a section that we spoke to about, with staff, you have an opportunity to do both informal and formal meet-and-greets. So, that might look like before day one just popping in. And we even have an example, I thought this was adorable, where the executive was local to the headquarters and so, those folks that had pets all got together and they walked their dogs together. That was the very first time that they met one another. It was a dog-walking moment. And I just thought, wow, how fun and easy breezy. It was staff at all levels and it really broke the ice, if you will.

Because, again, put yourself in the position of how everybody's getting a new boss and people are not so sure, especially those who may not have had an opportunity to be in the interview process. So, these are great, informal ideas. But then, when you look at the first 30 days, when you're setting up that agenda, 100%, all staff meetings are fantastic, so that they can be formally welcomed and that people can get to know them.

I have a client now who's going through the onboarding process. Going back to the question that Myra answered, she was invited to dinner of the previous founding executives at their home and met their family. The outgoing executive was coming off of a three-month sabbatical and had no intention of continuing their term with the organization. Everything was on the up and up and very positive, but I just thought that was a wonderful gesture, and really gave everyone an opportunity to get to know one another and open up those lines of communication.

And then on the staff side, they were able to set up what would be the virtual equivalent of a fireside chat. There was a moderator, they offered questions from the staff and they were anonymized. The new executive didn't know who was asking the questions and there was some levity involved. So, it was just a very light, bright way to introduce the executive to the staff.

Short answer to the question is, you can be creative, but the issue is to get it down on paper, get it down into a plan, so that everyone knows what to expect. Where we get into hot water is, well, when are we going to meet this person? And then lo and behold, the first meeting is a one-on-one or tough feedback or something like that. So, you really want to be mindful that you're facilitating a process of building trust in that relationship.

Alicia Schoshinski: Thanks, Danisha. And another question is about when you have a board member that ends up going into an executive staff role, do you do anything differently in those situations?

Myra Briggs: I've actually had that happen a number of times, and I think you take it on a case-by-case basis. I think, in some instances, you really do want to manage the process as you would with anyone else, so that your new executive gets the actual new executive onboarding experience, and nothing is neglected or taken for granted that they may or may not know or an experience that may or may not be valuable to them. However, we do want to deal in not only fact, but in reality. And what that means is that we want to remember and think about if this executive director or this new CEO has had any run-ins with the team that could potentially negatively affect their transition from the board to an in-house executive.

And if those are some of the things that are in place, it's a place where you can use executive coaching or some sort of mediation. The fireside chat that Danisha just mentioned would be a fantastic way to get staff involved, to ask some questions about how you plan to transition your leadership style from being a member of the governing body to now being internal to the organization where you're actually responsible for the development of your team. And there are some very important nuances to the relationship between a board of directors and the staff of an organization, as well as the executive director or CEO and the staff of that organization.

So, it stands to reason that that executive will need some assistance and support in transitioning into that relationship or even transitioning from that vantage point, from that point of view, in terms of how they're viewing the team and how they view their responsibility in coming up with solutions. And I think executive coaching is something that can be very useful in helping them make that transition. So, there's a little bit of both. You do want to make sure that you hit all the spots, you don't want to neglect the fact that they know where the coffee machine is, you don't want to neglect the fact that they already know how to submit expense reports or anything of that nature. They should get all of that in the same way that anyone else would.

But then you also want to deal with the reality of the situation, which is that you have worked with this person before. You do understand the dynamic of the relationships that they have with stakeholders, funders and people internal to the team. And it's also very important to use that opportunity to manage those relationships as well as the transition from that person being a governing member of the board to now being a CEO or executive director of the organization.

Alicia Schoshinski: Great, thanks.

Here's a question, and if we have time, maybe each of you can chime in on this. I'll start with Jami. What is one thing that maybe you recall that a new C-suite executive wishes their team did for them in the first 30 days? Any thoughts from your past?

Jami Armstrong: Typically, something would immediately come to mind, but I can't think of anything. Nothing is coming to mind.

Alicia Schoshinski: Maybe on the flip side, something that somebody asked here is what's something that resonated that you've heard a new C-suite executive liked that was done during their onboarding?

Jami Armstrong: The questionnaire. Yep, I'm going to live by the questionnaire. It's just extremely thoughtful.

And, as I mentioned earlier in the call, it lets them know that you're prepared, and you were ready to receive them, not just as a human resource, obviously, because they're going to be everyone's new boss, but as a human. I have heard a couple of variations of the questionnaire approach. It's a great initial, high-touch approach, and you can't go wrong with it.

Danisha Martin: I'm going to piggyback on that, Jami. On the one hand, what I hear most often is that a new executive comes into an organization, and instantly feels the chatter or the circumstances around the transition. If there has been no coaching of the staff to say, Michelle Obama is coming to our house. We need to at least try to put on our best pair of shoes and give a week of good and decent behavior. No one wants to come into a mess, and sometimes people just need to have that centering moment beforehand. It's not that there's a lack of authenticity or anything like that, but it can be disconcerting to walk into an environment, and there's gossip or there's something that doesn't feel welcoming.

On the other hand, I'm going to tell you a quick story about the newest COO for a client of ours who called me, I was the search consultant who placed her, frantic. And I'm thinking, what awful thing has happened to this woman? She had just received her favorite meal from her favorite restaurant delivered to her home. And it just seems so small, but for her, the fact that the organization took the time to find out what her favorite meal at her favorite place was and take it to her home was huge. It was huge, and it just spoke volumes, especially in this virtual environment where it is a bit more challenging.

It requires a bit more forethought from an organization to pull something off and it wasn't for anything other than to just say, "Hope you've had a great first week, hope you have an enjoyable Friday night and we'll see you on Monday." And I just thought, how classy is that?

Myra Briggs: That's a great story, Danisha.

And if I could piggyback on the first part of what Danisha talked about, what I've heard is that executives are looking for true transparency. A lot of times we're doing a little bit too much preparing for Michelle Obama to a point that it is not realistic in terms of what the new executive can expect on a day-to-day basis.

So, we need to be prepared to make sure that they feel welcome. Everyone showing up to welcome them and to share, correctly. But it's also very important that if there are any land mines, that you give them the map. They've already said yes, they've already signed the employment agreement and you've hired this person to come on and make a difference in your organization. And they absolutely cannot do that if they are fighting "gotcha" moments. They just can't.

They can't do that if there are things about your organization that for some wild and crazy reason, you're hoping that they will never find out. They will not be able to do that if there are things that are obvious that you chose to withhold from them, and that is 100% going to be the detriment of the relationship and the tenure of that executive. They've taken the job and 9 times out of 10, they've done more research than you think they have on the good, the bad and the ugly concerning your organization, because it's a part of their career legacy. We're not talking about people that are moving around in mid-career positions, we're talking about people who are executives in organizations. And if they make a choice to come to your organization, you better believe they've done some research. They will count it as an offense if there is something that you have chosen to withhold from them.

So, transparency is key in the midst of all of the pleasantries and wonderment that will go into making them feel welcome. Also, make sure you let them know, "We brought you flowers because there's something real bad behind the door." Now, it doesn't have to be that direct, but there definitely needs to be a conversation around the real issue that you want them to help with.

Jami Armstrong: I like the word track, "Give them the map."

Danisha Martin: That's right.

Alicia Schoshinski: All fabulous advice, all great ideas. Once you get the executive in the door, there's still a lot more to do. Once you've selected them, I mean, and you have to get them in the door and keep them going down the road.

This is all great information that our presenters provided, so thank you again to everybody attending. Thank you to our panelists for leading today's discussion. We do have many, many more webinars coming your way in 2021, so be sure to check out our events calendar at nonprofithr.com/events.

I know there were some more questions in the questions panel. We will be sure to answer some of those and provide the recording to this webinar as well as the slides and any other helpful things. You should get that within the next week, including the SHRM and HRCI recertification codes. Please be sure to complete the feedback survey that's going to pop up once the webcast has ended, because your comments certainly help with our planning and can inform future topics we cover as well.

So, if you'd like more information about available services or support from Nonprofit HR or Impact Search Advisors by Nonprofit HR, please email info@nonprofithr.com or visit us on the web at www.nonprofithr.com. So, thank you to everyone, and I hope you have a wonderful day.

Jami Armstrong: Thank you, everyone!

**Onboarding Your Nonprofit's C-Suite Executive:
How to Make a Lasting Impression**