



Virtual New Leader Transition Process

BACKGROUND: In today's rapidly changing environment, it is imperative that new leaders quickly connect with their staff, assess the workplace reality and set the tone for what's important and how they like to work. Traditional methods of meeting face to face aren't always realistic given time and distances between offices. A new approach is required where incoming leaders can connect with employees virtually in an interactive and engaging way and learn through a surveying what is being experienced at all levels of the organization.

PROPOSED PROCESS: There are three phases to a Virtual New Leader Transition Process as outlined below: Gilburg Leadership Inc. (GLI) will work closely with the leader to accomplish each phase in a timely manner.

1. Planning:

- Schedule a virtual meeting with each office
- Schedule 3 planning meetings to determine the following:
 - Create a timeline of actions required to accomplish the leader's goals
 - Discuss virtual meeting plan and process
 - Outline communication plan between the leader and employees
 - Clarify the leader's message to staff during virtual meetings
 - Determine Survey questions

2. Facilitation Delivery: GLI will use a ZOOM virtual platform and include appropriate security measures to mitigate unauthorized use. GLI will create an interactive virtual meeting agenda that includes the following:

- Brief introductions for those attending
- Time for the Leader to address staff
- Small group breakout time for staff to discuss what they heard and form questions for the Leader to answer
- Plenary Q & A
- Time for the Leader to share survey intent, process (e.g. anonymity, how information will be collected, etc.), how the information will be used, and when to expect an update on Survey results
- Meetings will last no more than 90 minutes and all visuals (slides / handouts) will be 508 Compliant

3. Virtual Meeting Follow Up:

- Assist Leader with communication to staff after each virtual engagement:
 - Reflect on experience, questions asked
 - Reiterate purpose of survey, clarify instructions/deadlines and provide link
- Administer survey to all employees

- Create a non-attributed report to share with the Leader
- Develop a 'themed' synthesis of all survey responses to share back with employees
- Work with Leader on identifying critical issues and determining next moves
- Help craft communication response to all staff re: survey results

RATES: GLI has fixed rates for consulting and facilitation services with the GSA. The cost of the program depends on the number of virtual meetings required and the number of survey responses that need to be synthesized into a report.

[See a case study example at this link.](#)

GLI Program Philosophy

GLI delivers standardized programs and services that cater to the needs of our clients and capitalize on our strengths and expertise in Leadership Development and Team Alignment. We understand and have great comfort working with the complexity of human dynamics and interpersonal relationships, and specialize in designing interactive, accelerated learning experiences for professional teams that serve the important work they do. Using techniques that enhance creative thinking, data analysis and integration, group intelligence and open conversation, we create an environment where it is easy for individuals to share their perspective, listen to others, name the ground truth, and collectively devise practical interventions that will bring about the outcomes they desire.

We believe that more than ever, an organization's success depends on the capacity of its people to work collaboratively in increasingly diverse, complex and interdependent environments. These capabilities call on individuals and groups to identify and adopt behaviors that promote inclusion, improve trust, increase knowledge sharing, and allow for adaptive problem solving.

Our overall approach lends itself to individuals feeling more connected and supported by team members, thus fueling greater collaboration. Transparent process and defined post-retreat action steps and outcomes provide a foundation for teams to have high levels of accountability and trust in the follow up phase. Relationships improve, learning is accelerated, and the work gets done well.

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References can be provided upon request