

# New Captain of the Ship? Tips for a Steady Course

*Strategies for taking the helm of your new position.*

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**S**o, you have just been hired by a district as its new chief financial officer. Your predecessor, who is retiring, has been with the district for many years and is beloved by all.

You are excited! You have a thousand things in mind, and you have been plotting the course you want the organization to take since you landed that first interview.

After all, leadership is about setting a course for your team, setting SMART—specific, measurable, attainable, realistic, timely—goals, right? You have read every management book and many articles on the topic of leadership.

However, have you taken the time to listen to what the folks in your new organization have been saying? The talk around the water cooler

is not about the new guy, it's about how much they are all going to miss your predecessor. Sure, when you meet the new folks, they say, "Welcome to the district." But at some point during the ensuing conversation, they add, "You have some big shoes to fill!"

So, dear new leader, take that as the first warning shot across your bow! Alarm bells should be going off! A giant yellow caution sign should appear that says, "Tread lightly, new leader."

But wait! Don't we always talk about leaders being captains of the ship? A ship has only one captain giving the orders. And you are that new captain, right?

Well, here is where we distinguish between a Captain and a captain. Did you notice the capital letter difference? It wasn't a mistake. One is the title you get with the job; the other is the title you earn with respect. Guess which one has the capital C?

Let's review the plan you began making before you even started the job. Is the plan all about you? Does it focus on what *you* will do in your first 90 days in the office? Now create a solid three-month plan (or round it to 100 days if you are a real go-getter). Read over that plan and make sure that it doesn't just talk about you.

Here are some strategies to set the right course.

## Get to Know Bob

Let's start with the old boss, Bob. How much have you gotten to know Bob? Have you taken him out for a quiet lunch or dinner to get his thoughts and perspectives on the team in the office or on the district as a whole? Have you asked him for his impressions of the business department? Have you found out who the stars are and who needs some work? Have you learned who the key stakeholders are in the administration or on the board?

Now, look Bob straight in the eye and say sincerely, "Bob, you are really a loved and cherished member of this business office team. If you were in my shoes, what would you do to establish yourself in the job and keep up all the great things that you have already accomplished?"

Here's the tricky part: you really have to listen! Bob may downplay his role or his popularity, but emphasize that you are serious and you want not only to do the right thing for the department, the district, and its students, but also to support Bob's legacy of achievement.

The next question is just as important: "Bob, is there anything that you would like to have changed or a project that you would have taken on but just didn't get the time? Something that would make the team and the department stronger?" Underscore that you have your own goals, but that he knows the shop far better than anyone and that you value his input.

Finally, ask Bob to identify his key team members. Who are his go-to folks for different issues? This question may sound like a variation of the other questions, but it's important to ask this question last. We all know that the organization chart sometimes says one thing while the trust chart says something else. Bob has had a chance to get to know you, and now you are asking who you can trust and who you can work with during the transition. You may even ask who would be a good fit for a "transition team" to help you get up to speed and to allow you to get to know those key folks better.

## Get to Know Your Crew

Now, comes the hard part. Although you get to sit in the new high-back office chair (or on the new ergonomic bouncy ball), you need to hold yourself back. You can't just jump into the fray. Take the time to meet with the suggested transition team and come up with your group of SMART goals for the short term. Highlight your plan to get to know everyone in the department and see how the department operates.

During your first 90 days, make sure you spend some quality time with the key stakeholders in the administration. You will get to know your key customers—the decision makers with whom you will be working closely for the rest of your career there.

Get some information from these folks. Find out what processes and operations your department does extremely well and what processes and operations the staff believes could be improved. How about new programs or processes? Are there things that you should look to improve in the coming months? How can you increase your value to the district office as well as to the folks in the schools?

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As you begin developing your updated 90-day course, remember to incorporate your transition team. Be sure to set aside some time every day to get out and meet the employees in each of your shops.

That time is also an important first-impression opportunity. If your predecessor passed along a compliment about them, let them know! "You know, Ellen, in talking to Bob last week, he mentioned how much he appreciated all the hard work you have done here and shared how much he valued your skills."

Imagine the look on Ellen's face! You are starting your relationship with her by reinforcing that you also support her and her work. (Of course, if Bob didn't like some employees, you don't want to share that information with them. Just make up your own mind.)

Finally, get together with the entire team so that everyone can meet you and hear from you at the same time. Lay out your thoughts and your priorities. Let them know that you are not out to reinvent the wheel, that you are aware of what a great department they worked with Bob to build. Let them know that you hope you can count on them to work with you as you try to continue to improve the services that your department provides the district and the schools.

A great way to end this meeting is to remind them that you are there to learn from them as well as to help them all achieve even better results in the department and in their individual careers.

If you choose to have an open-door policy (I always have, and it has been a great benefit in every office that I have had the privilege to lead), let them know. Make sure they know that you value all of their experience and their input. Reassure them that you spoke to Bob, who shared his respect for his former colleagues and employees. They will feel better knowing that you are not there to erase their former leader's legacy, but that you are there to build an even stronger legacy.

So what's the big difference? What did you do that was so different from your original 90-day plan?



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Well, you shifted your mentality from “I” to “we,” and you kept the team together. Sometimes when a boss leaves, two things happen:

- The team circles up and attempts to leave the new leader out of the circle! Why? It's a defense mechanism, it's their game, and you are coming to take the ball away.
- The team members begin worrying about their own futures. They have a natural will to survive, and they will wonder whether their jobs are safe under the new boss. Will you value them?

All of your effort in establishing this team mentality will go a long way in bringing the team members out of their shells of fear and getting those ships back on course.

Most important, you have established yourself as the new leader and the newest part of an already-successful team. Keep it up, Captain, and good luck!

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