





## CHAPTER 1

# DRILL DEEP

### Negotiating the Intelligence for Informed Decisions



**I**t is a truism that information is a prized asset in today's complex, often matrixed organizations. Few leaders would launch any new project without careful preparation, yet they frequently take on high-profile assignments optimistic that they can make them work once on the job. By contrast, in overwhelming numbers, the women we talked to who successfully navigated difficult and visible new assignments counted good preliminary intelligence among their most valuable tools. Drilling deep not only enabled them to determine whether the role was a good fit for them, it also helped them negotiate the conditions of success before they set foot in their new offices.

Moreover, these leaders went after a particular kind of intelligence. By and large they took for granted their command of market trends or the competitive landscape, the technological edge a new product would enjoy, or the distribution channels the company needed to develop. That expertise they counted as part and parcel of any leadership position. As the head of procurement for a Fortune 500 manufacturing company put it: "The hardest part in a leadership role is not the work. That's easy if you are halfway smart. It's the ability to read the political tea leaves."

Good intelligence allows the new leader to put those tea leaves to work. Seldom did the successful women in our sample approach

new roles confident that they were a perfect fit for the job. Rather, they assumed that the role itself was negotiable and probed for what would tip the odds of success in their favor. Sometimes they tested the breadth of support behind the initiatives they would be charged with spearheading. Other times they used their intelligence gathering to get past the rhetoric and identify future obstacles.

The successful leaders moved quickly to get a handle on the problem they were charged with solving and the expectations circling round its resolution. A high-tech executive offered a promotion to straighten out the company's back-office operations used her networks and one-on-one interviews to discover how deep the troubles went.

The order process had broken down. Receivables were in awful shape. Salespeople were having a fit because no one could figure out their commissions. Financial controls weren't working. It was a disaster.

Armed with that intelligence, she could approach the CEO and accept the assignment—subject to one condition. She would need time to do the job he wanted done. “When things are in that much of a mess in finance, it's usually because processes have gone amok. There aren't quick fixes.”

Most of all, the women who seamlessly managed the transition to new roles focused on unspoken codes of behavior and the personal dynamics at work in key relationships. Many new leaders are promoted from within or recruited from outside because something needs to be fixed. Indeed, this is more likely to be the case for women.<sup>1</sup> Not everyone in the organization, however, will be ready to accept the need for new leadership. No matter how elegant a proposed plan for, say, turning around a faltering division, gaining competitive advantage, or revamping outworn systems, it will find its way to the circular file if it rubs against the organizational grain or fails to garner critical support.

Early intelligence can flag how deep the resistance to change goes and where potential alliances might be formed. When, for example, a human resource executive contemplated joining a rapidly growing



construction firm, she had no doubts about her ability to transform an organization that was essentially still run as a mom-and-pop operation. Even though the culture no longer correlated with where the company was on the growth cycle, many of the old guard liked things the way they were. The key to her success lay in determining whether she would have the space to make the changes necessary. Discussions with the president about his vision for the future provided that key. Growth on the scale that he anticipated demanded major restructuring.

It is clear that good intelligence puts a leader in a better position when negotiating the parameters of a new role. Yet women do not always operate with good intelligence. With limited access to the process that led to their appointment, they might not even know why they were chosen for the job. Without that information, they may make assumptions about the fit that influence not only their decision about accepting but also their perspective on what it would take to thrive in the new role.

Good informants are hard to come by when you're being recruited from outside, but even being a current employee does not always provide easy access to information nor guarantee its reliability. Women frequently find themselves excluded from key decision-making networks within their own firms.<sup>2</sup> Simultaneously insider and outsider, their perspective on any new assignment is inevitably colored by past experiences and past relationships. While a true outsider may be positioned for greater objectivity, being an outsider means facing the formidable task of developing reliable sources of information. Whatever the circumstances, the more you know about a new role before taking it on, the greater your chances of success.

## COMMON TRAPS

Access to intelligence can be a challenge for women, yet sometimes unwitting steps prevent them from learning as much as they can about a prospective role. From the stories women told us we have isolated four

key mistakes that can lead women (and men) to narrow the range of issues they consider when assessing a new position—with unfortunate results. In different ways, the traps short-circuit the search for additional intelligence. By casting an opportunity in black-or-white terms, they reduce the incentive to search out the nuanced information or multiple perspectives that lead to an informed decision about whether to take on the role. They tempt the unsuspecting to leave unexplored issues that should be put on the table for negotiation. The power of these traps shows up in the frequent refrain: “If I’d only known then what I know now . . .”

- “Fit doesn’t matter; it’s performance that counts.”

Some people underestimate the difficulties that can be encountered during transitions into new roles.<sup>3</sup> Casually assuming that they will fit in once on the job, they can downplay the impact of the organization’s culture and fail to appreciate the inextricable link between their eventual success and perceptions of their suitability. Others in the organization have to feel that the new leader’s style is in sync with organizational norms, and they judge qualifications through that filter. This maxim holds whether the new leader is promoted from within or recruited from outside. New leaders run into trouble when they screen out signals of a bad cultural fit as noise.

Kelly, attracted to a strategic marketing firm because of its cutting-edge methodology and its span across industries, took over a struggling account in the automotive industry. A self-taught marketer, she casually assumed that if she delivered results nobody would care that she did not have the proper pedigree. With a great deal of sweat and little support, Kelly turned the account around and the client into a staunch supporter. “Then they brought in a strategy person from Harvard who had worked at one of the premier consulting firms to take over.” The company wanted the account turned around; she was right on that score. But it was also inordinately concerned with its image. That preoccupation surfaced early in the ever-so-slight condescension and patronizing tone Kelly detected during the interviewing process. But

she never pursued these signs and never negotiated a safety net tied to performance. “I didn’t have a big school name or the proper consulting credentials. . . . He’s now running a well-oiled machine that is churning out revenue that I developed.”

New leaders are not always judged solely on their performance. Intelligence about the strategic business needs driving a particular assignment may not be enough. You have to probe deeper into the organization’s underlying norms and values. Ignoring dissonance on this front can prove costly.

- “This is such a wonderful job; I’d be a fool not to take it.”

A role can present such a big step forward in responsibility that intelligence is deliberately not gathered. The opportunity looms so large that it overshadows any need to investigate the downside. The CEO of a neighborhood health plan put the matter succinctly: “I wanted the top job. I didn’t want to hear anything that would discourage me.” Unfortunately, potential problems do not disappear with the suppression of evidence. They simply go underground where they cannot be worked through.

A prestigious title, a company with instant name recognition and credibility, greater authority—all hold out a seductive promise: “This appointment means I’ve finally made it!” With rose-colored glasses firmly in place, it is easy to overlook the hard work ahead and to skimp on gathering the intelligence that makes that work possible. Sheila managed the direct sales efforts to attract first-time investors to her financial services firm. Having grown up at the company, she felt a tremendous loyalty to it, but she worried about her future there. The company, following an industry-wide trend, had shifted its growth strategy to focus on institutional investors, and her department was rapidly becoming an orphan, with little visibility and decreasing impact on the bottom line. Sheila felt stuck. Then she got a tantalizing call from a recruiter. Would she consider a move? A discount brokerage firm was in the process of acquiring a trust company to expand its customer base. The move would put Sheila where the action was—with high-net

worth clients. After watching her department lose influence, she jumped at the chance to work on the side of the business that everyone watched.

Sheila failed to gather intelligence that would have been hers for the asking—the high rate of turnover among associates and burnout among key executives at the discount brokerage. Without that intelligence, she could not negotiate for the kind of training and development that would be needed to stem the outflow of associates or for the safety net that would provide her some security in the pressure-cooker environment she was thinking about entering.

Blinded by excitement and challenge, it is easy to overlook the things that will block you. The benefits of an opportunity can, of course, outweigh the obvious negatives. The important thing is to take on an assignment aware of the downside. By drilling deep you can get past the sales pitch. Rather than ignore or suppress the bad news, let that bad news contribute to an informed decision and provide the foundation for some serious negotiation.

- “I love a challenge; I can’t wait to tackle this problem.”

Successful people are often optimistic, convinced they can tip the odds in their favor by sheer will and energy. Before charting the dimensions of the problem they will face in the new role, they naively assume that they can make it better. “That’s an interesting problem; I can solve it.”

An executive in health care insurance relished the high-risk profile of turnaround situations or problem areas.

It’s a challenge to get in and fix something. The upside to fixing a problem area far outweighs going into an area that is status quo, which everybody thinks is fine. If things are going well and you come on board and change one thing and it messes something else up, everybody says, “Uh, oh.”

Zeroing in on the risk profile of a potential assignment is a key part of intelligence gathering. But this analysis tells only half the story. Interesting problems do make for interesting jobs. Problem solving, however, is seldom a solitary undertaking. Cooperation and resources



are integral components of success. Focus only on the work—the *what*—and you might uncover the intellectual challenges ahead. But in all likelihood you will miss significant roadblocks. Intelligence on the *how*—how the work will get done and how much support it will enjoy—is equally important.

Caroline, a biotechnology executive with enviable connections within the venture capital world, discovered the high cost of the fix-it syndrome. Wanting to be where the action was in small-molecule drug development, she left a top-tier biotech firm to take a position with a small start-up. The prospect of helping to build a company from the ground up was intoxicating. “I thought I’d be able to fix the problems and turn the company around. I saw some warning signals, but I ignored them.”

Caroline took it for granted that—after twenty years in the industry—the company’s founders knew how to “form and structure a business.” She excused some questionable practices as a lack of business sense. That she could supply. “They were spending money on frivolous things like a logo. They were paying consultants way too much for stuff that didn’t need to be done.” Caroline was sure she could fix that. Not long after she walked in the door, she realized her optimistic assumptions had been overly generous. She had overlooked some serious issues.

The founders didn’t lack business sense. They knew exactly what they were doing. Their friends worked for the companies that they were giving business to; they were buttering each other’s bread.

Fixing problems is basic to leadership positions. But more is involved than coming up with a brilliant solution. Some problems prove more intractable than expected not because they are inherently more complex but because the organization lacks the collective will or the resources to solve them. However tantalizing the problem, it is a good idea to temper the fix-it syndrome with concrete intelligence on the problem’s prospects for solution.



- “I don’t have much choice; I have to take this on.”

A lot of situations can make you feel boxed in. Perhaps your company is going through a merger and you would be grateful to land anywhere. You may have spent a long time with your firm and have a gloomy view of your prospects elsewhere. You may be at a point in your career or with a company where second chances are few and far between. Turn down a promotion and the powers that be will think twice about offering another. In an era of downsizing, mergers, and increasing pressure for more productivity, there may not be much room at the top. Pass up an offer and another will not necessarily come along. Our stories are peppered with vignettes from women who thought they had no choice.

The assumption becomes problematic, however, by extension. Little perceived choice on the initial decision can subconsciously translate into no choice at all. The assumption frames the decision making in categorical terms—Yes, I will accept; No, I won’t—and forecloses the possibility of “Yes, but” or, better yet, “Yes, and.” Even when you do not think much of your bargaining position, there is almost always room to maneuver. Taking on an assignment—accepting that *no* is not an option—does not mean that there are no other options to negotiate. However constrained the initial choice about taking on the role, there remain multiple points that can be negotiated on just what that role entails (and will need).

Karen, a veteran with a Fortune 100 consumer product company, was asked to take over integrating the R&D functions after a merger. “The role was difficult. The guy there was a caretaker who couldn’t wait to get out.” But Karen did not think she had much choice at that point and accepted the assignment. Trapped by feelings that she could not say no, she never drilled down to find out whether there were negotiable elements. The job might have been reconfigured to mitigate the difficulties ahead.

It is fine to recognize the perils of saying no in various organizations or of passing on an offer from a new firm. The danger comes in thinking





that a *yes* carries across the board and forecloses the possibility of negotiating the terms of that acceptance.

## STRATEGIC MOVES

Digging deep can help you stay out of your own way. The intelligence it yields makes for more grounded decisions. But, more than that, it sets the stage for a process of negotiation. Turning down an opportunity because it seems too much of a stretch forfeits that opportunity. Good intelligence can surface the information you need to negotiate and see whether the job can be reconfigured to work for you and the organization.

To be effective as a leader, you need a role that is aligned with the organization's needs and with your goals. Difficult assignments are easier to take on when they come with support and a safety net. All those conditions can be negotiated. These negotiations never come with a fail-safe. You can never be certain that they will produce the desired results. But they might. That is why drilling deep is so important. The intelligence often reveals the issues that must be negotiated and provides ample clues that can help you put together your strategy. As one of the women observed: "If businesses could afford it, everyone would date before they got married. All you can do is to find out as much as you can."

Drilling deep for the intelligence keys on people—likely dissenters as well as supporters—and breaks down into four linked strategic moves.

- *Tap into networks:* The more you know about the situation, the better prepared you will be to negotiate the conditions of future success. Using your networks, both internal and external, is a prime way to gather broad-brush information. It gives you multiple perspectives on the opportunities and the difficulties ahead. It can also produce useful thumbnail sketches of the people involved.
- *Scope out the possibilities through engagement:* The relationships you create with key individuals and stakeholders are critical to effectiveness.

Engaging with them helps you test whether you can work together productively and begins the process of role negotiation.

- *Confront confusion:* Intelligence gathering can produce contradictory impressions. When things are not hanging together, when mixed messages keep coming, pursue those contradictions. If consensus is missing on the assignment, it is a good indication that difficulties lie ahead.
- *Anticipate blockers:* Support for a new leader is never universal—nor is resistance. Identifying potential blockers early enables you to develop a strategy for dealing with them before they gain momentum or sabotage your efforts.

Alice Lind, a broadcasting executive, was recruited to head up a major division of a media conglomerate. Alice wanted any assignment she took on to be a win for her and for the company. To decide whether this move was the right one for her, she drilled deep for intelligence. As she uncovered more and more information, she used it to negotiate with key people to create the conditions that were likely to make her effective in the new role.

Alice started her intelligence campaign with two criteria in mind: First, she wanted a boss who did not micromanage—"I wanted someone who hired really good people and then got out of their way. I had worked in the past for some aggressive borderline personalities with punitive leadership styles. I didn't want to go there anymore."

Then she hunted for signs that the organization gave more than lip service to the standard lines about creating learning environments. "Everyone says that. You have to test the rhetoric."

We return to Alice after the discussion of each strategic move in this chapter and trace her steps as she searches out information to learn enough so that she can negotiate a role that will work for her and for the organization.

### Tap Into Networks

Nothing substitutes for good information, but that information can come from a number of sources. Networks represent a major resource



and can provide particularly useful help when it comes to analyzing choices. Successful women leaders tend to maintain two different types of network: a strategic one usually made up mostly of men who can advise them on their career and work, and an equally strategic network of women they turn to for support and advice on choices and challenges.<sup>4</sup>

Because networks are made up of individuals, their members have different perspectives, and those insights can expand your thinking about a new role or position on two critical levels. First, network members' familiarity with the organization can help you get behind the sales pitch, which may gloss over potential problems with, say, the resources that will be available to you, or the company's reputation or market share. Second, the process of interacting with key players, if candid, can provide valuable clues on the tenor you might enjoy in your working relationships once on the job.

#### *Learn About Challenges from the Inside*

People within the organization may have held the position or a similar one in the past. These are the people who can give you a better understanding of the role. Those who have been with the organization for long enough can also offer important observations on the organization's norms and culture as well as the prevailing style of its key leaders.

Even before Barbara began serious discussions with her boss about her potential new role as a deputy managing partner, she spoke to others in the firm about their experiences in similar positions. The role of deputy managing partner is a complicated one in Barbara's firm. First, the majority of deputy managing partners are women, but the managing partners they report to are men. Given these reporting relationships, Barbara worried about her ability to create and maintain a portfolio of work that she could claim as her own. Since the position was limited to a two-year term, she needed a body of independent work she could point to later.

To gather intelligence on this thorny issue, Barbara mobilized her women's network within the firm. From their responses, she spliced together a good picture of how female colleagues managed their



relationships with managing partners and differentiated their work. These discussions gave Barbara, already a very senior woman within the firm, the intelligence she needed to negotiate not only the space and the support she needed to take the lead on a strategic firm-wide project but also the recognition that went with it.

#### *Mobilize External Networks*

It's also possible to build networks of people who hold similar positions outside the firm. They can serve as benchmarks against which to evaluate a role. These benchmarks make it easier to defend and justify what you need in the upcoming negotiations.

Gloria, about to be promoted to executive vice president in the private banking division of a money center bank, mobilized her networks outside the firm. Talking to women in comparable positions at other large banks, she learned about how the role was defined in those organizations and discovered the range of resources the position commanded. The resource equation included both budget and the compensation package. Gloria then put this benchmarking intelligence to work so she could defensibly ask for what she needed. In negotiations with the bank's president, she used it to back up demands for a resource allocation that fit the job. (As a sidelight, this networking paid off in another way—Gloria's list of contacts at other banks grew geometrically.)

#### *Seek Advice from Mentors*

Mentors fall into a distinct networking category. Whereas members of most professional networks focus on the job, mentors and others with whom you have maintained close relationships are concerned about *you*. Their advice is based on their knowledge of you and provides unique insights. But individual mentors furnish different kinds of counsel. Some offer primarily social and psychological support while others confine their advice primarily to career advancement.<sup>5</sup>

Wilma's mentor supplied both. When she was asked to shift from project leader to vice president of business development, she thought it was a crazy idea. Her mentor convinced her that she had the skills

to take on the position and be effective. “I’ve watched you in sales meetings. You connect with the client. The rest you can learn.” His advice encouraged Wilma to accept, but she still entertained doubts about the rest of the job’s requirements. Before talking to her mentor, Wilma would have turned the offer down. Her mentor helped her think about what she needed to succeed. She negotiated for sessions with an executive coach and for a safety net. If either the president or she was not satisfied with her progress after a specific period, she could go back to project management, which she really loved.

Tapping into networks should involve a multifaceted approach. Marianne, a specialist in senior placements at high-technology companies, mobilized her diverse networks to evaluate an opportunity on the West Coast. Her company had its full complement of partners, and with the drop-off in technology hiring, she did not see much possibility for growth. Then a call came out of the blue from the managing partner at a much larger firm. They had an opening in their technology practice, he said, but the recruitment process was confidential. “That was a tip-off that I should investigate pretty thoroughly. I’d heard via the grapevine that there was an internal candidate, but it wasn’t working out.”

The managing partner took her out to lunch and offered her the job on the spot. “That worried me even more,” Marianne says. Although the managing partner was charming and charismatic, he avoided offering any details. On the way out the door, he quoted a starting salary. The offer was so offhand that Marianne did not know whether it was real or not, nor did she have much sense of where she would fit in the organization. “We didn’t talk titles or the profiles of the clients I would be handling.”

Marianne wanted to accept, but she also wanted a clearer picture of just what she would be accepting. She began to tap into her networks for more detail on the firm and the key players in that office. Marianne started her inquiries with four advisers located in New York, rather than close to home in San Francisco. “You have to do this due diligence quietly, both to protect you and to protect your sources,” she says. One of the four, a woman, headed human resources for a major media

conglomerate. The woman had been Marianne's original mentor, hiring her directly out of college and then shepherding her transition to search. Marianne took her advice seriously. "This mentor had her ear to the ground everywhere."

The connection was fortuitous. Marianne's mentor had interviewed the managing partner when her company was selecting a search firm to use for a key appointment. The impression he created was not positive. "When she told the managing partner that they were interviewing other firms, he said, 'I don't do shootouts.'" Marianne's mentor considered his reaction arrogant, an attempt to circumvent the company's internal processes, and recommended another firm. This information gave Marianne pause, but she was still inclined to go ahead. She thought she could work with the managing partner and smooth out his rough edges. Her alternative—staying with her firm—was not very attractive to her.

At the request of the managing partner, Marianne met with another partner and got a formal offer, one somewhat lower than she was expecting, given her previous informal conversations with the managing partner. With a concrete offer in hand, Marianne began some serious due diligence. She called a peer in another search firm who had gone up against the managing partner on numerous occasions. Like Marianne's mentor, this peer advised extreme caution. In a business that depended on circumspection and reputation, he was uncertain of the managing partner's principles. He also thought the man could be difficult. "He told me they had a lot of résumés from people who had worked for him," Marianne says. The information was upsetting, but still Marianne was inclined to go ahead. She *really* wanted to make a move.

Finally, Marianne decided she needed to tap sources inside the firm. Although getting information from sources within the company was difficult, Marianne managed to discover quite a bit from people at the firm. She learned that the managing partner did not have a background in technology and was not a likely sponsor in her specialty. "Off the record," everyone told her to stay where she was.

Not one to rush to judgment, Marianne considered this feedback carefully. Everybody, as she says, has a "rap sheet." In tapping into

multiple networks, you can sort out whether the feedback from an individual source is an outlier or represents a broad consensus. “You have to see if it’s consistent,” she says. In Marianne’s case, it was—consistently negative. Before she started seeking out various sources for information, Marianne had no way to know that this move would have been a big mistake. She might just as easily have discovered that the opportunity was just that—a great opportunity. At a certain point, the preponderance of the evidence signals you to bow out gracefully or pursue the assignment aggressively.

Alice Lind tapped into an extensive network in media and communications that she had built over time. “You need to talk to a lot of people who know the person you are going to work for. Because you know what you don’t want, you have to know how to ask the right questions in a way that people will respond and reveal things. What is his management style? What are the communication requirements? How often do you talk? If you had to name one thing that drives you crazy about this boss, what would it be?” She sought out colleagues who knew the chairman. She interviewed them. “I even asked the chairman for references.” And then she talked to them about him and his style.

Alice was also concerned about the culture in the firm. She wanted to work in a collaborative environment where decision making was widely shared. She looked for indications that the company supported training and professional development. In her experience, that support was a key indicator that employees were valued. During interviews with the head of human resources, she asked about in-house training support—“How much money is spent on training as a percentage of budget? How does HR work with each of the operating units and deal with the people issues? What frames compensation? Do you benchmark against other companies and other positions? What is the turnover rate?”

Alice also networked both inside and outside the company to get a handle on the company’s reputation. “I got a heads-up on what people felt were, from an industry perspective, the opportunities and challenges ahead for the business.” All this intelligence informed Alice’s perspective when she began serious negotiations with the chairman about her role.

Effective networking yields feedback on a position but also on your qualifications to take it on. It helps you get a fix on why you are

being considered when other candidates might seem more appropriate choices. It helps you answer the critical questions—Why are they considering me? and Why are they considering me *now*? It opens your eyes to what it will take to be effective in the role.

But how do you know when you have learned enough? It can be tempting to gather so much information that it becomes paralyzing. As one of the women confessed: “I learn so much, I see all the reasons why I shouldn’t take the risk that the new role entails.” She misses the point of gathering intelligence. The information points out what you need to negotiate to mitigate as much of the risk as possible.

### **Scope Out the Possibilities Through Engagement**

Networking provides general and comparative information. Engagement, by contrast, enables you to drill deeper with individuals with whom you will work. In interview after interview, the women stressed the importance of establishing solid working relationships with colleagues and superiors. These stakeholders have different personalities, different ways of communicating and making decisions, different biases. Can you work together productively? How strong is this one’s commitment to the job you are taking on? Does that one value what you bring to the table?

Some critics contend that women put too much emphasis on relationships—that performance is *all* that matters. The women we interviewed uniformly disagree. They have learned that their effectiveness is inextricably bound to the strength of the relationships they are able to form. Nor do they assume that they have special skills as women that make these relationships any easier to build. Connecting with others—on problems, on roles, on mutual interests—takes work. People do not always share what is on their mind, particularly when someone new is coming in or a change on the organizational chart is contemplated.

#### *Test the Match with Your Skill Set*

The most productive intelligence gathering happens when the information flows both ways. You need to know as much as possible about





an opportunity before taking it on. But you also want to make sure that the key players involved in the decision are making it for the right reasons. They have to value what you bring to the table. Credentials and experience seldom line up exactly with the requirements of a prospective assignment. Rarely are the dynamics perfect. The key questions intelligence can answer are whether you can be credible in the role and whether the expectations are reasonable for both parties.

By engaging potential colleagues and bosses, you do more than learn about their styles, their modes of operating, and their interests. You create an opportunity for them to get to know you—your abilities, approach, and objectives. In other words, you both advocate for your own interests and connect with these critical players.<sup>6</sup>

Establishing value can be pivotal if you are recruited from outside or do not bring the usual credentials to the assignment. New leaders are always under close scrutiny and it is imperative to discover whether perceived gaps in expertise are likely to cause headaches later. When Lisa joined an information technology company with 130,000-plus professionals worldwide, she knew next to nothing about technology. Her previous experience had been in government and international finance. She was brought on board to rescue three large (and visible) contracts. She drilled deep with software designers and the firm's management, intent on finding out why they would choose her. She discovered unanimity on the need. The firm was revamping the Medicaid processing for three states and the project was in chaos.

"All three clients were worried." The firm's reputation was on the line and they needed someone who realized the importance of getting it right, but also who could talk to the clients. Without that intelligence Lisa doubts that she would have accepted the position, let alone been able to negotiate with the engineers and management to get their commitment on the time and resources she needed to rescue the projects.

Eager to ferret out information about a prospective assignment, you can focus all attention on the intelligence coming in. It is easy to overlook the importance of sending information the other way. The



preliminary steps you take to establish your value during an intelligence campaign lay the groundwork for mutual respect to develop. At a minimum, the effort ensures that all parties are comfortable with the potential fit.

### *Test for Gaps*

Scoping out through engagement is a mutual testing process. You are interested in probing how key stakeholders understand the difficulties and opportunities ahead and whether that understanding connects to yours. As the discussions unfold, you can assess whether they see potential gaps in your credentials. Are those perceptions likely to impede your effectiveness? Are they strong enough to interfere with the benefits you hope to realize from the assignment?

Teresa kept a firm hold on her objectives when she joined a state insurance commission. She brought the academic credentials of an MBA and five years as finance director of a high-profile nonprofit. She also knew that she did not have star power, and the commission operated squarely in the political arena.

Teresa pressed the commissioner on her lack of connections and political savvy. “I was not a political animal. I was not connected. I didn’t know any of the players.” At each point he reassured her, playing down the commission’s political sensitivity. “He sold the commission’s independence.” But Teresa’s skepticism was aroused. “I didn’t get a good feeling though—there were too many unanswered questions.”

Teresa suspected that she was not the ideal candidate. Subsequently she discovered that she was the second or maybe third choice. But she weighed the information and decided to accept the position anyway. The important point is that she went into the situation with her eyes wide open. She wanted to move out of the nonprofit sector. This opportunity, even if short-lived, would give her experience in public finance and credentials as a CFO, and it would broaden her contacts significantly. And she felt that working with the commissioner would be a good learning opportunity.

*Test for Chemistry*

Through engagement, you create occasions to explore specific issues. But you can also use these opportunities to test for rapport. The tenor of the conversations reveals a good deal about the possibilities of working together productively. Emily, for example, had twin goals in her intelligence campaign. After working abroad at senior levels for large firms in the telecommunications industry, she wanted to return stateside and land a position where she could contribute to growth over the long haul.

When Emily was recruited to take over human resources for a spin-off telecommunications company with an international footprint, the pressure was intense. “The IPO was looming. The CEO kept saying, ‘We really want to move this along.’” Emily slowed him down, and he responded favorably to her careful coaching. That, she thought, was a good sign.

The environment was chaotic. The growth was phenomenal. But it’s one thing for a job to be exciting and interesting; it’s another to get in there and have the whole thing collapse.

Only by engaging key individuals was Emily able to figure out whether the job was doable and would create the opportunities to contribute that she sought. She singled out relationships with the management committee as the critical indicator of her ability to be effective.

My gauge was whether I could develop a rapport with them within an hour to the point where the discussion could turn from me telling them my background to how we would work through a couple of issues. So you are already on a platform that assumes, “We’re colleagues; we can help each other through this process. It is not going to be easy, but we can figure some ways we might be able to move this thing forward rather rapidly.”

Emily was not content with scoping out the possibilities for rapport, however. She probed decision making and priorities.

I also tested how open the key individuals were about the tough issues, especially the people conflicts within the organization. Again looking at the role that I was considering, I needed to understand if there was going to be a possibility of building a team.

During each engagement Emily took care to demonstrate the value she would bring to the organization and her ability to deal with complex contractual issues. These meetings also helped her figure out what she needed to be successful in the role. To contribute at the level she knew was within her reach, she had to secure certain commitments from the CEO. Although the previous incumbent had been a vice president, Emily's experience as an ex-pat convinced her that titles were important in the global arena, especially with an IPO in the offing. She needed to come on board as executive vice president to have parity with her European counterparts. She also needed parity at the home office. Human resources had to be considered a full-fledged member of the executive committee. The title would secure that membership. The CEO, already engaged and anxious to bring Emily on board, agreed.

Opportunities can be tested on multiple levels during an intelligence campaign. You want to figure out where the prospective assignment fits with your long-range plans. But you should be equally concerned with discovering whether you want to spend a lot of time with these particular people—whether you detect in your interactions with them the promise of solid working relationships developing in the future.

#### *Test How the Role Is Defined*

Engagement lets you test chemistry. It is also the primary vehicle for negotiating revisions in the way a role is defined. What's offered is not always a good fit. Alternatively, it may be a good fit, but not something you want to be doing. Or worse, as currently configured it seems like a recipe for disaster. There is always potential room to modify a role to fit your career aspirations and in ways that make your life more livable as well.

Demands that encroach on your personal life do not have to be accepted in their current form. As you gather intelligence, you can

explore how much flexibility there is and whether, with some deft negotiation, the role can be reconfigured. Helen, one of the most senior women in technology sales in her Fortune 100 company, would be the first to admit, “You never turn down an assignment in my firm.” But within that corporate constraint, she leveraged her intelligence to move beyond that categorical “yes/no” and negotiated terms that made a new role attractive. “The two previous incumbents were pushed out for nonperformance. Top management wanted someone who knew global distribution channels cold.” Drilling deep, Helen discovered “that someone was me.”

Helen, the mother of two teenagers, did not relish spending the next three years on airplanes or in the firm’s foreign subsidiaries. She had enjoyed a great career with the company and did not want to risk being forced out if she did not accept the offer, which she considered a real possibility at her level. After much thought, Helen came up with a solution: she could put her mastery to work in the home office if she had the right lieutenants. They could gain valuable experience and accumulate frequent flyer miles, and she could spend more time with her family. Her knowledge of the company told her to position this demand not as a lifestyle choice but as a needed team-building effort. By negotiating terms of an ostensibly nonnegotiable offer Helen produced an alternative that was good for everyone: key staff members got important experience, the quality of Helen’s home life improved, and the company saw its channel distribution in capable hands.

Alice Lind singled out the relationship with the chairman as pivotal to her decision. Having had some bad experiences in the past, where she felt micromanaged and sometimes abused by bosses, she wanted to discover whether she and the chairman had the makings of a good working relationship. She had specific criteria in mind. She wanted a relationship that preserved her autonomy, but one that also made him comfortable.

Alice and the chairman spent many hours together. Their first encounter was over the telephone, and even there she felt a positive chemistry. “He’s much younger than I am, and I brought experiences to the role that were different from his. The conversation was easy.” It was clear to Alice that their styles were complementary. “I’m a pretty broad thinker and so is he. As the conversations

unfolded, one question would go off into dialogue as opposed to question after question. We had agreement on the important issues confronting the business.” They were also comfortable with each other. “I was authentic. He was authentic. There was no posturing. The energy was good. And that was the way it was—easy, comfortable, but invigorating and fun.”

In their ongoing conversations, Alice began to engage him on her role and the way he envisaged working together. “After interviewing with the executive committee and with certain intelligence under my belt, I could go to the chairman and say, ‘This is my preliminary assessment of this role. These are the kinds of things I would need from you in terms of resources.’ That’s when he could have said, ‘I hear you, but forget about it.’ So there were now ways to move [the conversation] from the possibility of a partnership to concrete ways of working.”

As part of that negotiation, Alice posed situations where she would need support and tested to see if it would be there concretely. “I told him there would be a need to reevaluate the entire team. My guess was that there were people with baggage who might not be able to make the turn, given where we both wanted to see this business go. He was going to have to support me when it came to making tough people decisions.” The chairman agreed that the team Alice inherited might not be the one to move the company forward. When she did have to make these tough decisions later, she had his full backing.

Conversations about the job and business take place whenever a new role is in the offing. It is what happens in these conversations that is important. Through engagement, the successful women in our stories tested their intuitive reactions, listening not just to what was said but to the tenor of the talk. They paid attention to the information they were receiving and to their feelings. They trusted their responses to the quality of the dialogue and to the participants. This scoping approach enabled them to use the conversations as the first steps in building relationships critical to their future success. As part of that relationship building, they were revealing the value they would bring and also the style they would use. They demonstrated both as they began to negotiate the terms of their future role.

### **Confront Confusion**

If scoping out through engagement is about initiating critical relationships, confronting confusion is about surfacing and exploring potential



difficulties. Confronting confusion starts with intuition. In the conversations you've had, things just do not seem to make sense.<sup>7</sup> The mixed messages create a vague sense of unease. For good reason. When the main story line does not hang together, the contradictions often reveal a lack of consensus on the role as well as the obstacles ahead.

Not all the i's can be dotted and the t's crossed up front when a new assignment is contemplated or a new role considered. A certain amount of confusion is natural. As a result, people often ignore these signals, figuring that they can take care of them once they are on board. That can be a dangerous approach. Not all confusion springs from superficial sources. Beyond a certain threshold, the confusion, if not confronted, can seriously reduce your effectiveness. Top management's ambitious plans do not square with the organization's capabilities. How can you perform without the basic systems in place? The CEO balks at putting you on the operating committee, but promises you free rein. How can you exercise that authority if you don't have a voice at the table? Is this a setup?

Pushing back on disconnects like these—confronting the confusion—brings potential misunderstandings out in the open. By paying attention to these mixed signals, you can get to their source and begin to negotiate toward a shared understanding.

Negotiating this shared understanding up front is particularly important because an expectation of change accompanies any shift in leadership. These days new people are invariably brought in to fix problems, but before taking on a problem, you need to know why management thinks you are the person to fix it. Otherwise you will not be able to negotiate the support you need to carry out your mandate. You also need some clarity on the problem's dimensions. By confronting any confusion here, you can negotiate the expectations of just how far-reaching the changes must be.

#### *Confront Confusion Over the Reasons Behind Your Selection*

Confusion can start right off the bat, with you. You may not be sure why you have been tapped for a key position. You may not know why you

are being considered or why you are in the running at this particular time. A disconnect on the talents to be marshaled on a new assignment can mask a more troublesome confusion on the role itself. For example, when the management committee of a major consulting firm drafted Rebecca—an energetic partner—to take charge of a faltering region, she admits, “I was shocked, to be honest.” Given her track record as an effective team builder, Rebecca naturally assumed she had been singled out for her people skills. But over the years Rebecca had also acquired a reputation for her willingness to deliver a tough message—to top management and team members alike.

Rebecca was not, in her words, “an unvocal person.” She quickly moved to clear up the confusion, pushing back on the reasons for her appointment. As she expected, “The word *teaming* figured high on [the] list.” But so did her ability to make hard personnel decisions. “The word *tough* was used about forty times, I think.” Probing, pushing back, Rebecca discovered the complex reasons behind her selection. This intelligence helped her understand what the new role demanded and what the management committee expected.

#### *Confront Confusion Over Commitment*

New or expanded initiatives can create confusion over the level of commitment needed to get them off the ground. Conversations focus on the results—the addition to the product line, the increased revenues, the smoother operations—with scant attention paid to what it takes to get there.

Polly confronted this confusion when the president of a public broadcasting station approached her to lead its largest fundraising drive ever. The plans were ambitious. But were they realistic? Warning flags went up for Polly when she noticed that no one on the board talked about the additional capabilities and infrastructure that would need to be put in place. She pursued the mixed messages aggressively, quizzing the board and then key staff members, the president, and even the volunteers.



At the end of one meeting I asked the staff members to send me the operating plan and list of top donors. There was dead silence. One person said, “Well, I guess we could call the finance department and get them to pull something together.”

As she suspected, the infrastructure would not support the drive. The development department did not generate its own data. Every time she needed a report, she would have to run to finance.

Polly confronted the confusion directly with the CEO. She pointed out the chasm between the development office’s capabilities and the challenging campaign ahead. Something had to give. They could muddle along as they were, in which case she would pass on the job. Or they could commit the resources needed to pull off the campaign. With the right systems in place, she estimated that they could significantly raise the target. The CEO—a “terrific guy”—apologized. He was so excited about bringing her on board for the campaign, he just assumed she would “take care of the backroom stuff.” Confronting the confusion between aspirations and capacity head-on, Polly not only got the commitment she needed, she also brought the CEO to a greater understanding of what a major campaign entailed.

#### *Confront Confusion Over the Role*

And, finally, confusion over how a role is defined must be confronted. Lines of authority or responsibility can be blurred, giving rise to both mixed messages and dissension over the boundaries.

Catherine confronted these conflicting views when she was asked to take over as interim CEO at a credit union. An executive vice president when the previous CEO left abruptly, she knew that the board had been struggling. Relations between the former CEO and board members had turned sour. Unappreciated, they began to intrude on day-to-day operations. With no shared vision of what corporate governance entailed, the board concentrated on details. “Members,” Catherine says, “were not only unpaid—they were unhappy.”

With board members unclear on their responsibilities, Catherine's role was left in limbo. To address the confusion, she bought a copy of John Carver's *Boards That Make a Difference* for each board member. Carver's model of board governance provided an objective third-party perspective as they began to define the separate roles of the board and the CEO. During these discussions Catherine paid attention to group dynamics and made an effort to solicit individual points of view. "I spent a lot of time pre-selling my ideas." Clearing up the confusing notions about respective roles had two outcomes: The board was happy and pressed Catherine to take the top job on a permanent basis.

Alice Lind tried to identify what she called "potential disconnects" between her view of the business and the chairman's. "I had gotten a heads-up from people I knew in the industry about the challenges and the opportunities. I wanted to see whether the chairman saw the same challenges. Was there a disconnect between, say, how the advertising community viewed the business and how he viewed it? Since I would be interfacing with the ad community, I didn't want to have a big disconnect." Talking about the advertising budget and target audiences convinced Alice that she and the chairman were on the same page.

Alice did have to push back a bit on the structure. The company had operated in the past as a "consortium of free-standing units." The chairman was comfortable with the current structure, but Alice felt it would have to change. To her, the functions were interrelated and she believed they needed greater integration to move the company forward. Without that integration, Alice's efforts to forge a productive interface with programming and marketing would have been frustrated. The chairman was reluctant to restructure. Over several conversations, Alice tried to understand his hesitation, but she also began to explore the comparative costs and benefits of the two organizational charts. In the end, she persuaded the chairman that integration would not only save the company money by eliminating duplication, it would make for more efficient operations.

By confronting confusion, you surface potential problem areas that can then be negotiated through. You want to start any new position with as little misunderstanding as possible to lessen the chances of unpleasant surprises.

### Anticipate Blockers

It is a good idea, when taking on a new role, to remember that organizations are political places—and that the people in them are political players. They have interests to protect and agendas to advance. They also operate with mixed motives—concern for the organization’s health and their own career being the prime drivers. There will always be outliers whose ambition swamps all other considerations, but in the main, executives’ corporate and personal interests pull in the same direction. Or at least they almost always think they do.

Notions about the best course for an organization to follow, however, can diverge radically from one executive to another. As a general rule, it does not matter *what* future agenda you are associated with, your appointment will run into opposition from those who believe it interferes with their interests—corporate *or* personal. An influential division group president subtly pushes for her candidate. A colleague, sensing a rival, lobbies against any new initiatives without specifying the one you are in line to head up. A subordinate whose career tracks that of his boss lobbies behind the scenes.

If initial attempts fail to block the appointment, the disaffected often try to undercut the newcomer once she is on the job. They question whether she will be strong enough or has the organizational clout to turn around the operation. They cast doubts on the agenda and her ability to see it through. They withhold information or tie up the release of needed resources with red tape. Meetings mysteriously get rescheduled, or the newcomer is excluded from them.

Individually these spoilers can cause trouble. When unchecked, they can foment dissension and spark the beginnings of a blocking coalition.<sup>8</sup> It is essential that anyone taking on a new position anticipate who the potential blockers might be. Early identification prepares the way to negotiate a truce or to work on other means of neutralizing their impact. Resistance and naysaying, if allowed to persist, can undermine early efforts and make a tough new job even tougher.

*Identify Probable Blockers*

People block for what seem to them good strategic reasons. They may have little interest in your success if they see their influence waning as a result. Passed over for the position, they may harbor resentment. Alternatively, they may sincerely believe that the choice does not bode well for the company. Other candidates, in their mind, would have been able to pull the team together or been more effective change agents.

Gina faced this challenge when she was promoted to vice president for technical services. Not an engineer by training, she anticipated that the software engineers would question her appointment. “Even though I have a computer sciences degree and a background in the field, there would be grumbling. ‘Why wasn’t I chosen?’ ‘Why wasn’t our beloved engineer given the job?’ ”

Going into the role, she knew that she would have to contend with potential blockers. She monitored behavior and productivity, looking for clues as to the likely candidates. They were easy to spot. Based on this intelligence, Gina set out to neutralize them or, if possible, convince them to come on board. The carrot she used was proof that those management skills they thought insufficient qualifications for the job actually made *their* jobs easier. “My strength is in management; my technical background supports the management decisions I make.”

Gina’s intelligence also told her that the grumbling had been going on for some time. “The engineers felt marginalized by my predecessor. He’s abrupt and makes decisions by fiat. He was almost always right, because he’s so smart, but the engineers felt that they had no say in their jobs.” Intelligence not only pointed out possible blockers, it showed the way to convert them to supporters. Gina began right from the start to involve the engineers in the decision-making process.

*Look for Likely Sources of Resistance*

During reorganizations, the new roles created usually reapportion responsibilities. Some people emerge with expanded functions; others find their burdens lightened. Since influence links inextricably with responsibility, not everyone will embrace the changes. Typically they



react by resisting. Although the resistance can be public and direct, more often its expression finds less obvious outlets. Anticipating the behavior enables you to put a strategy in place that either enlists the potential blockers to work with you or minimizes their opportunities to influence others.

Emma stepped into a newly created position as development director for a prestigious liberal arts college. Emma's role, the result of reorganization, fused previously separate functions—corporate and individual fundraising and alumni affairs. The rationale behind the change was clear. The school wanted to work more closely with alumni to expand its fundraising base. The idea was to mobilize devoted alumni so that they would not just increase their giving as individuals but would become partners in development.

Emma, recruited for her background in development, had no credentials in alumni affairs. The associate director for alumni affairs, however, was experienced. She could clearly run the function effectively while Emma devoted her attention to upgrading the fundraising office. Fundraising was understaffed, but Emma resisted the temptation to bring on another associate director immediately. Over the course of several conversations with the associate director of alumni affairs, Emma realized she could easily turn into a blocker and undercut Emma's efforts to build the new department. The woman managed her department well and enjoyed a comfortable and long-standing relationship with the associate dean. She would resent any attempt by Emma to insert a new layer of leadership between her and the dean. With this intelligence, Emma proceeded carefully and cemented her relationship with the associate director before making any moves to increase the management staff in fundraising. By then, instead of undermining Emma's decision, the associate director actually supported it in talks with the dean.

*Pick Up on Who Might Be Disaffected*

Some people block because they have been denied the promotion they consider rightly theirs. In other situations, potential danger comes from individuals who have been eased out of a position for performance



reasons, but remain in the organization. And occasionally an incumbent sticks around ostensibly to teach a successor the ropes, but cannot resist the temptation to second-guess.

Andrea faced this prospect when she considered a move to a quasi-public state finance agency as CFO. The demands of the financial function had outgrown the skills of the current CFO. A long-time political appointment, he was taking early retirement. After helping Andrea get oriented, he was slated to leave the agency. “The notion was that with some tutoring from him, I’d be fine.”

During the interview process, however, Andrea realized that the transition might not be so smooth. “The director treated the current CFO, an older gentleman, as a father figure.” Andrea could see the problems with how the financial function was run. Those she could handle. What concerned her was the current CFO. He had the director’s ear. Watching the director’s deference to the CFO during those interviews, she decided that she would never gain his confidence if he heard a running commentary on her actions and decisions from someone else. And the CFO was someone, she thought, who could not resist meddling. She would need the director’s commitment that the tutoring period would be of a specified—and short—duration. Andrea was in a good position to make this demand since the financial function needed a thorough overhaul and she had the expertise to make it happen.

#### *Figure Out Who Feels Threatened*

Finally, blockers can be expected to emerge when a newcomer’s agenda threatens their interests—either organizational or personal. Beverly, as head of human resources, had witnessed the phenomenal growth of the construction company where she worked. Five short years transformed it from a local outfit to a publicly traded regional home-building powerhouse. The president, well aware that the organization’s structure had not kept pace with its growth, asked Beverly to take charge of administration. “The sticking point was whether I could get people to accept me in this expanded role.” The president’s plan increased

Beverly's responsibilities—but not her authority. She would still report to the vice president of finance. And he would jealously guard against any effort at greater autonomy.

When Beverly headed up only human resources, “all hiring approvals had to go through my boss in finance.” She was “always caught in the middle—the person communicating back and forth.” That arrangement would prove untenable if her responsibilities increased to all administrative decisions. The vice president of finance, however, would fight any move to change the reporting relationships. “Everything the other executives wanted would cost money and he was the money person. He enjoyed having the final say.”

Beverly imagined the likely reaction of the other executives: “Why do we still have to go through finance? What's the point of dealing with Beverly if she can't make the decisions?” She also expected that the vice president of finance would undermine any attempts she made to deal directly with other members of the executive team. To be effective in the new role, she needed to neutralize his ability to undercut her. “Finally I talked to the president. I explained that this triangle effect was time-consuming and not in anyone's best interest [conveniently sliding over the opposition that would come from finance]. If we didn't change the reporting relationship, there was no point in carving out a new administrative function. It would fail.” The president agreed. The vice president of finance would likely remain a potential blocker, but Beverly had negotiated up front the support she needed to deal with him.

Alice Lind faced a potential blocker. In the interest of putting all the revenue units under one roof, one of the division presidents would now be reporting to Alice instead of the chairman. “This was going to be a really big give-up for her. Having run a business myself, I could understand how hard this would be. During the interview process, I told her that.” Alice described the interview as difficult and emotional. “She is my contemporary. We both knew that we were telling the truth about how hard that was for her, how I would have to prove to her that I would support her initiatives and not divide her team.” They have since become business partners.



Anyone taking on increased responsibilities can expect resistance from people who see their interests compromised by the appointment. But those blockers can be identified. Dealing with them early on is a challenge. Sometimes they can be enlisted as potential partners. But that conversion is not always possible. When it is not, a new leader needs to act on that intelligence and use it to circumscribe their influence before they can assemble a blocking coalition.



Drilling deep provides the information you need to make informed decisions. Greater understanding of the factors in play lessens the temptation to cast situations in black-and-white terms. *Yes or no* gives way to *maybe* and opens up the possibility of negotiating other options.

The women we interviewed who engineered successful transitions acted on the intelligence that they gathered in various ways. But one aspect remained constant. The intelligence oriented their subsequent negotiations. Some, after exploring the risks, used the information to negotiate a safety net. Wilma, for example, gave up a job she loved to take on business development only after she had negotiated the possibility of a return to project management if neither she nor her boss was satisfied with her results. Teresa, on the other hand, used the information about a difficult situation and a difficult boss to calibrate whether a new job as CFO would answer her personal goals, even if her tenure turned out to be short.

With each increase in awareness, each layer of information, these women added to their ability to bring new opportunities into alignment with their leadership styles and personal measures of success. They probed and pushed on the resources they would need, the backing they could count on, and the criteria by which they would be judged. They explored the reasons behind their appointment—the skill sets and experience they would be expected to bring to bear. But they did more than uncover this information; they used it as a stepping-stone to negotiate resources, to clarify metrics, and to forge the beginnings of good working relationships. They tested for chemistry and commitment;





they engaged in a mutual exploration of the problem they would be charged with solving.

These efforts at drilling down enabled them to approach their new situations with their eyes wide open. They saw the possibility of stretching the current view of the role. Helen, now head of channel marketing for a major technology firm, used her knowledge of corporate culture to broaden her choices beyond a nonnegotiable yes-or-no decision. Roles are negotiable; you can make them fit your needs and those of your organization. But you have to know what points need to be negotiated. Intelligence provides those insights.

## KEEP ON PROBING

Digging deep for intelligence is, however, not a one-time thing. There is a limit to what you can know before actually taking on a new role. Pushing for certainty where none is available can create the impression that you are high-maintenance individual. As key relationships evolve, roles must be constantly renegotiated. Situations change—new leaders come in, restructurings occur. With each change, the steps of drilling deep need to be revisited.

Alice Lind, for example, explicitly contracted with the chairman for reality checks going forward.

“The culture here is driven by being nice but not necessarily honest. I said to him, ‘Part of why we are going to be a good team is that I have had some experience in facilitating change, but you are going to have to tell me how fast and how far.’ There are times when I have told him that [the troops] were getting a little uncomfortable. Am I moving at a pace that’s too fast? He told me to keep on, but keep an eye out.

“This culture and my boss are also big believers in feedback. He gives it to me and I give it to him. We share. That has been helpful as a newcomer to an organization. It’s taken me thirty years to figure it out.”

In a world of rapid change, adaptive power becomes a critical factor in organizational success.<sup>9</sup> Good intelligence is a cornerstone of adaptability. At no point, perhaps, are adaptive powers stretched more

than when considering and taking on a visible, high-profile assignment. Good intelligence makes the initial decision and the transition more manageable. It puts you on alert when a key relationship may need to be shored up and signals the appropriate time to push for more support. It also helps you understand the reasons behind resistance. Moreover, intelligence is a renewable resource and drilling deep a perpetual process.

## GET READY TO DRILL DEEP: STRATEGIZING TO NEGOTIATE FOR INTELLIGENCE

Effectiveness in a new role hinges on negotiating the conditions of your success. To negotiate, however, you need to be prepared. Only with the right intelligence can you make informed decisions. Consider what you know about yourself and what is important to you in any role you take on.

### **Tap Into Networks**

People—mentors, sponsors, those on the inside and the outside—can help you make solid decisions. But you have to seek out their counsel. Have you tapped into your networks to gather data on the company, the key players, and the role?

- Prepare a list of questions you need answered about the role. Pay attention to your motivations for considering the assignment, issues that make you uneasy, and your other options.
- Who inside or outside the organization is best positioned to provide the answers you need? (If you are having difficulty identifying the right people, ask yourself, Who knows the people I need to talk with? Then ask that person for an introduction.)
- Who knows you well and can be trusted to give good advice? Encourage them to ask you challenging questions about why you should or should not relish the assignment.



- Is there a pattern in the information that you don't want to acknowledge? What is it telling you—about the personalities involved or the histories of your predecessors?

### **Scope Out the Possibilities Through Engagement**

Success in any role is more complicated than simply doing a great job! You will have a hard time enjoying the work and performing to a high standard if you do not enjoy solid working relationships with your peers and key players in the organization. Have you engaged them in meaningful conversations about their expectations?

- What business and organizational issues do you need to discuss with key players? What do these discussions indicate about your chances of establishing good rapport with them?
- Does your style complement theirs? If not, how might that complicate your working relationships?
- Does the role as described fit your needs? What modifications can you propose? If you do not think you are in a position to turn down the assignment, how much flexibility do you have in defining it?

### **Confront Confusion**

Is there anything that seems confusing to you? Are you getting mixed messages? Trust your instincts. If something seems odd, you need to ask more questions.

- Why have you been selected for this assignment? Are your experience and skill sets a good fit? How serious are any perceived gaps?
- Are you getting mixed signals about the firm's commitment to the business objectives or to your appointment?
- Do you have a clear mandate? Is there consensus on the problems? How committed are the key players to fixing them? What will it take to get their commitment?

- Do you feel comfortable that you understand the parameters of the role? Where do you fit on the organizational chart? Are there any disconnects between the descriptions of the role you are getting and the organizational structure?

**Anticipate Blockers**

Do you expect resistance? You should. Don't be surprised. Figure out the people who might be potential blockers and think about the reasons why.

- Who might be unhappy with your appointment? Why?
- Will anyone feel threatened by your appointment?
- How can you bring them on board or at least neutralize them?
- Will you have the authority to redeploy or replace them if their resistance becomes destructive? Have you enlisted key players to still doubts or blunt outright opposition?