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From the President

Welcome to the first issue of "Insights," a periodic publication of the [Carlson Search Group](#).

[In March](#), we announced a new venture to create a high-touch executive search firm that focuses on mid- to senior-level retained searches for financial services companies. The response has been terrific, and our belief that there was a real need for a specialized retained search group has been confirmed. Our pledge to conduct searches and cultivate partnerships with integrity, quality and results has resonated exceptionally well with both our clients and candidates.

Now it is time for the next step - ongoing communication with our partners. Whether we have done business together in the past or we are looking at future partnerships, this newsletter is our way of keeping in touch with you about what we are seeing as trends in the marketplace.

"Insights," as the name suggests, is about our understanding of the issues and topics confronting our clients. Because we understand and respect the demands on your time and the daily challenges you face, we are committed to providing you with current ideas and proven strategies in a concise, readable format. You may find a direct solution in our observations, or you may discover a thought-provoking new angle to an issue at hand. In either case, we think you will benefit from a newsletter written especially for you -- addressing topics that come directly from you and the questions you ask us. We continue to build on the knowledge and perspective gained during the search process, and we believe our experience will be helpful to you as well. You are a busy and productive business person with no time for generic e-mails. Let Insights be a source for fresh ideas and new approaches to today's executive employment issues. No fluff, no frills -- just the facts.

Topics and conversations that we frequently discuss include, but are not limited to:

- Finding and retaining top talent
- Diversity
- Succession Planning
- Corporate Performance/Strategy
- Workforce Dynamics
- [Executive Assimilation](#)
- Leadership development
- Coaching
- Workplace Culture
- Financial services industry updates

The list and possibilities are endless. So if there is another topic you'd like our perspective on, please let us know. We'd be happy to share our thoughts. In the meantime, enjoy your first issue. We welcome your feedback; [let us know](#) how we can serve you better -- either drop [us an email](#) or call the office at 515.224.2400. I look forward to hearing from you!

Gregg Carlson

Hit the Ground Running: Four Things to Do Before the New Hire Starts

[By Dean Hoppe](#)

You have just filled a key job in your organization and are anxious for the new hire to start. You have announced that she is coming on-board; now, it's a matter of just waiting for her to arrive. Right? Wrong! Don't wait for day one; there are actions you can take to ease that new hire's entry into the company. Here are some tips that you will want to consider:

Jump Start the Learning Process. Whether she is the new CEO or a first time manager, the new leader has a lot to learn about your organization. Make it easy for her. Gather articles, financial reports and information about her new direct reports; any information that gives her context, insight and knowledge will pay dividends. Put her in touch with key stakeholders (board members, customers, colleagues and vendors) who can accelerate her learning. Create a learning strategy!

Minimize Distractions So the New Hire Can Focus on What's Important. Make certain that her office is ready on "day one" and ensure that she has the security clearances, administrative support and technical tools she will need to do the job immediately. If she is relocating her family to your city, take steps to provide them with the resources and support needed for the transition. Do everything you can to enable her to focus on the job, including helping resolve challenges that may have accompanied the move.

Fill the Airways with News of the New Leader's Arrival. Go beyond the formal communication that announces the new leader's hiring. Provide information on the executive's role, her background and why she was hired (what she will bring to the organization). Meet with the new leader's team before her arrival to answer questions, surface concerns and solicit their support.

Open Doors to Key Colleagues. It will be critical that the new leader establish strong relationships with certain key colleagues early in her employment. Schedule the new leader to meet with those individuals and ask for their support and assistance in acquainting her with the organization. Some organizations assign an "informal internal mentor" to be available to support the new hire.

The success of your new leader ultimately rests on a fast but well-planned start. Don't wait until her first day to ensure that her entry into the organization is smooth, efficient and productive. By doing the above you will be easing her transition and sending her a clear message-both that she is valued and that she has made the right decision to join your organization.

Editor's note: This article was written by [Dean Hoppe](#), Senior Consultant/Executive Coach. Through a variety of proven and practical coaching tools and processes, Dean works with new hires to ensure and accelerate the [assimilation](#) of a new hire.

"Teleworking" -- A Potential Recruiting Tool

[By Cindy Johnson](#)

How many times do you find yourself logging into the office network late at night either to work on a project or simply to check your e-mail? How often do you have the need to work from home because you are caring for a sick child or need to be available when a service person arrives at your house? Working from home under these circumstances is widely practiced because people understand that, with the technology that is available, business can be conducted in other ways besides face-to-face communication. It comes as no surprise, then, that we are often asked by candidates about the availability of teleworking, particularly when relocation is possibly part of the equation.

Tele-what? Teleworking, sometimes used interchangeably with telecommuting, is a flexible work arrangement in which an employee is able to work from home or elsewhere, all or some of the time. Because CSG is dedicated to bringing together great companies and talented executives, we believe this concept deserves continued analysis and consideration by any company concerned with recruiting the best and brightest talent available.

If your company currently has teleworking employees at entry and mid-level positions, you are already familiar with some of the benefits. But have you considered telework as a solution to fill a need at more senior levels? As sophisticated companies become more creative and flexible in how they view the workplace, many are offering telework situations-potentially a key step in remaining competitive in today's marketplace, especially if it lands you that perfect candidate.

Whether employees work from a remote location some or all of the time, both employer and employee can

benefit from the added flexibility. In some cases, relocation becomes unnecessary. We have had several searches where a key consideration for an attractive candidate is maintaining a similar work flexibility that they have already garnered with their current employer. For these candidates, allowing them to work away from the office even one or two days a week can be the decision-maker, perhaps making an otherwise exhausting daily commute more palatable, or simply allowing them the flexibility to which they've grown accustomed. In either case, the possibility of working from home or elsewhere can attract some of the most qualified candidates to positions they may not otherwise consider.

Successful telework arrangements depend in part on a company's available technology and corporate culture. In addition, clear communication of expectations from all those involved-you, your colleagues, and your internal and external customers-is vital. Home-based corporate employees' needs also include technical support, trust from their employers, means of networking with coworkers, and continued opportunities for advancement. And, of course, ongoing communication and evaluation help ensure that teleworking arrangements continue to benefit all parties.

A recent article in the *Pittsburgh Business Times* states, "Portable technology, high-speed communication devices and corporate cultures that support work-life balance are enabling employees to conduct business no matter where they go." The article further explains that teleworking has become a great way for employers who value top talent over traditional work schedules to land some of the nation's best leaders in the market. Through teleconferencing, e-mail, and appropriate travel, executives are able to manage workflow and personnel efficiently away from the office. Teleworking solutions can be beneficial both to the company and to the employee. And, perhaps even more important, a more flexible work situation may be a deciding factor in landing a key executive who is critical to the future success of your company.

Editor's note: [Cindy Johnson](#) is a vice president with Carlson Search Group. She plays a key role in all Twin Cities-based searches, as well as focusing on insurance and investment industry searches across the country.

Recommended Reading: The New American Workplace

Thirty years ago, a report written by a task force commissioned by the U.S. Secretary of Health, Education and Welfare that focused on exclusively on the workplace became a surprise bestseller, *Work in America*. Although it was of an academic bent, it represented the first comprehensive look at the American workplace and, ultimately, the individual worker. It was described as "explosive" and "revolutionary" and became a valuable resource for a generation of managers and leaders.

Now, three decades later, in [The New American Workplace](#) by James O'Toole and Edward E. Lawler III, we are given an opportunity to revisit that study and look at how the workplace has changed, what we do better and what we will need to confront. With new research, the authors conclude that it is time for the United States to decide how it is going to compete in the new global economy.

Organized into four major sections, the book offers a close look at topics that confront the business world every day, including work/life balance, public policy, community and commitment, and training and development. Instead of recommending a solution - a pat answer that may or may not be relevant or useful to the reader's own circumstance - the authors provide examples of things that have worked well and areas that need improvement. Under "training and development," for example, they note what many globally successful companies have recognized-that offering training and development not only pays high returns on investment when the company is fully committed to education for its employees, but also offers a recruiting edge as the talent pool shrinks. The authors note that, sadly, this type of training and development is among the first areas eliminated, often to the detriment of the long-term health of the organization, when budget concerns arise. Instead of offering a grocery list of how-tos for training and development, the authors cite companies such as Boeing, Dell, Procter & Gamble, Pepsi and Cisco as organizations that are "doing it right." It is this repeated, subtle suggestion to evaluate where your company might fit on a scale of good to ineffective, based on their observations, that makes this book so practical.

Less academic than the original study, this book remains a thoughtful examination regarding workplace issues and practices that affect a company's overall success. If you don't have time to read the book, or want additional insight into the book, [Fast Company](#) had an interesting interview with the authors, and the website [Winning Workplaces](#) also features an interview with one of the authors.

Have you read any good books recently? Perhaps you've read an article you want to share. We are always looking for practical books that make us think about how to be more successful in business and other realms of life, so [please send us](#) your recommendations.

The Bottom Line

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