

***SMART TRANSITIONS:* Process**

First, *Smart Transitions* and the executive leader develop an agreement as to the scope, goals, and parameters of the engagement. Then—whether the executive leaders with whom we will be working are transitioning out of their current position, into a new institution, into a new role within the same institution, or are simply encountering new and complex challenges—*Smart Transitions* has a three-part process: an environmental scan; followed by one-on-one consulting sessions; and, finally, an end-of-engagement wrap-up and consulting session.

I: *Environmental Scan:*

Since knowledge of the institutional history, culture, and context within which the executive leader will work is crucial for the most successful executive leader / executive consultant relationship, *Smart Transitions* is committed to conducting an appropriate organizational “environmental scan” before any individual consulting sessions begin. The Environmental Scan is normally part of all executive consulting agreements, during which *we* will do some or all of the following, as appropriate:

- Review relevant institutional materials, e.g., accreditation report, institutional strategic plan, organizational structure, financials, search prospectus, and any other relevant materials
- Talk with the search consultant
- Develop a focused questionnaire for an on-site visit
- Conduct the on-site visit, interviewing e.g., board chair, search committee, executive leader’s team, and other relevant individuals

This is typically a 4-5 day process.

II. *One-on-One Executive Consulting Sessions:*

These sessions can occur in a variety of agreed-upon formats, e.g., in-person and on-site, in-person and off-site, or *via* telephone conference or skype, with “check-in” calls as desired. Some typical times during which *Smart Transitions* may be of service to executives in transition include:

- Executive leader transitioning out of the institution:
- New executive leader before campus arrival:
- New executive leader’s first year
- Executive leader encountering unexpected challenges

One-on-One Executive Consulting Sessions will vary as to the number of days spent, but usually 3-8.

III. *End-of-Engagement Wrap-up and Consulting Session:*

The “wrap-up” may address such items as goals accomplished, perceived challenges, and suggestions for the future. It is a confidential and integral part of the final in-person executive consulting session. The End-of-Engagement Wrap-up and Consulting Session is a 2-day process.

The total number of consulting days for this three-part process is normally 9-15 days.