# HR Mixtape: The Role of HR in Shaping Effective Leadership Transitions with Meg Crosby

## Hosted by Shari Simpson

### Featuring Meg Crosby, Co-founder of PeopleCap Advisors and Operating Partner at SSM Partners

**Announcer:**
You're listening to the HR Mixtape Your podcast with the perfect mix of practical advice, thought-provoking interviews, and stories that just hit different so that work doesn't have to feel, well, like work. Now, your host, Shari Simpson.

**Shari Simpson:**
Joining me today is Meg Crosby, co-founder of PeopleCap Advisors and operating partner at SSM Partners. With a background spanning organizations like Google and startups, Meg is a trusted advisor to CEOs and governing boards, known for her expertise in people strategy and organizational culture. Meg, thank you so much for jumping on the podcast with me today.

**Meg Crosby:**
Thank you, Shari. I'm happy to be here.

**Shari Simpson:**
So you have supported countless leaders through transitions. So I thought we could start with what's maybe one mistake that you often see organizations make in those critical first 90 days for new leaders?

**Meg Crosby:**
Well, I think there are so many, but I think what I would say is the one I see

the most often is leaders jumping in with both feet without listening to the organization, without sort of taking that pause to understand where the organization is on its growth journey, what's next, and how people are feeling about the transition. So I think a really important first step for new leaders in a transition is to do a lot of listening.

**Shari Simpson:**

I can tell you as an employee who has had more than five managers over the last eight years, I know what that feels like to have a new leader come in and start to make changes right away without them kind of understanding the landscape and some of the knowledge that exists with your employees. You know, some of the unspoken rules. I recently just moved departments, and one of the questions I asked my new manager was, like, what skeletons are buried in this department that I don't know about so that I can succeed? Same thing for new leaders, right? That coming in and like you said, listening. How does HR help support that?

**Meg Crosby:**

You know, I think that we get stuck a little bit on checklists and compliance and architecting, you know, strategic onboarding for new leaders. But I think sometimes we miss some of the more relationship stuff that we need to help them with. What are some ways that we as HR can shift our mindset in that?

**Meg Crosby:**

Sure. Well, I, let me first preface by saying, I'm giving you how I think about HR. HR is such a broad discipline. There are, you know, you have people looking at benefits contracts and case, you have HRS data folks, and then you have people doing talent management and recruiting and training. And so it's a very broad discipline. So when we talk about HR, I think about it in, in sort of, this is probably oversimplifying, but in two buckets. There's transactional HR, which are really the table stakes. And when companies begin, when they are in an emerging stage and are growing, HR usually starts out reporting to the CFO. It tends to be a very transactional and defensive posture of a function in the sense that we want to make sure that payroll is done on time. We want to make sure benefits are in place, that we have policies and

procedures and all the paperwork to just really get people hired. And that's table stakes. But as the company grows and talent becomes a really important strategic lever for an organization, HR begins to move into what I call the transformational side. And this is the really strategic HR that involves talent management, it involves change management, it involves performance management, all of the things that really can transform the organization in important ways. And so when I think about how HR can support a leader in a transition, I'm thinking about all sorts of ways. Obviously, we have to make sure that the transactional side, those table stakes are still running smoothly and that people are getting paid regularly. And if there are any glitches and hiccups there, that can trip up a leader in their transition. So listening to find out if people have complaints about their benefits or their 401k, those could be some quick lens that a leader can navigate through early in a transition. But on the transformative side, I think about HR coaching leaders, sitting down with leaders to tell them what's going on in the organization. They're really the pulse check of the organization. What's going on in the organizational culture? Who are the key relationships they need to build? Who are the key influencers in the organization? And how do those people relate to others? What are their working styles, their personality traits that leaders will need to be equipped with in order to navigate those things? So those are the kind of the things that I think about with HR support, really critical to new leaders.

**Shari Simpson:**
I love that you mentioned working styles. I have talked about this before in the podcast. From the HR perspective, as you present up to your C-suite different items and understanding your highest level, how they like to be communicated with. You know, some leaders want you to give them the story. Some want just the data. Some want the data, then the story, and then the backup materials. But that's, you're right, if you don't know that walking into an organization, what a great resource for HR to be able to sit down and have that conversation or create in your onboarding guide. You know, hey, here's the people you should meet with, and here's a couple things you should know about them, right? They've been here 10 years. This is how they like to be communicated with. I love all of that. I think that's such good advice. As

you've worked to help leaders kind of step into these roles, how do you wrap in data from the voice of the employee? So I'm thinking, you know, specifically if there's a team that's getting a new leader that maybe the team has been cohesive for a long time, and so they're getting a new leader. How do you take into account some of the things that the employees are sharing, but also with a grain of salt? And the reason I'm saying that is because maybe you're bringing in a new leader because the team is actually dysfunctional and you don't like their trajectory. And so you have to deal with that. But you do want to be sensitive to that employee voice.

**Meg Crosby:**
Oh, without question. I think that's, uh, so critical to the leader surveying the landscape. You know, you've got to understand what you're dealing with when you walk in. So there are a couple of ways that we do that. When we work with teams that are in transition, we often, you know, depending on the size of the team, the more voice we can get, the better. Let me just say that. But we start with interviews. So if it's a leadership team, we want to make sure we do one-on-one interviews with each of the leadership team members to understand what they think is working well in the organization, what's not working well. What is the culture like? Can they give us examples of how the culture works in the organization? What do they see as the quick wins for the organization? What needs to happen? These are the experts. They're on the front lines of this work every day. They're the experts telling us what they are seeing and what information needs to be related to this new leader coming in. If we are able to, we'll survey the entire company. We can do that online and get feedback from folks. And then, to your point, it's really important to look at the themes and the patterns that emerge, things that are said more than once. So, if you have a disgruntled employee that's an outlier, it's really easy to spot that, right? Because there's only one person with that highly negative opinion, everybody else has more, maybe more measured response or is not even thinking about that. So when we are able to get enough voices together to then see the themes and patterns, things that come up multiple times, then we're pretty confident that we can focus on things that most people are concerned about.

**Shari Simpson:**

When you think about pipelining for leadership, what are some of the things that you have thought about in resetting those expectations with someone stepping into a leadership role over their peers, right? There's a bajillion books on this, right? There's Bud to Boss. I think that's one that I hear all over and over again. But it can be, it can be really tricky. And sometimes you, as much as we'd love to have our pipeline ready to go, sometimes that's not something that we've been able to do. And so you have somebody stepping into a leadership role over their peers. What advice do you give them?

**Meg Crosby:**

I think, for me, I lead with establishing some strong boundaries. And that can be painful. I'll tell you a funny story. I worked for Google in the early days when Larry and Sergey had just brought on Eric Schmidt as the CEO. And at the time, they had been working in an office alongside a team of software engineers working on Google's products. And the company was about to go public. It was really in the limelight, a lot of press, there was just a lot going on for these young executives who were 30 years old. And so one of the first things that Eric Schmidt did was to create some pretty strong boundaries, which first he took them out of that group office, gave them their own office, and to put an executive assistant who was a buffer, and I called her also a bouncer for traffic coming in and out of the office. You know, that filter to make sure their time was spent on the things that were most important to the company and not really wasted on hanging out with the folks that they had been with before. And then that person also began to manage their calendar, manage their email, and filter information to them that was important for what they were doing. So I think establishing those boundaries is important. It's hard. That's a difficult transition for especially for those of us who had enjoyed that direct contact and easy contact with them early on to recognize that now there was someone sort of put in the way of that was frustrating. But I think we also understood that for the company to grow and scale and succeed, that they had to be hyper-focused on the strategy and growth of the company, not sitting in a bullpen with a bunch of distracting personalities. So I think establishing boundaries, understanding that that is hard, but doing that because it's the right thing to do to get the job done.

**Shari Simpson:**

My husband transitioned into a leader of leaders role several years ago now. And when he made that transition, he created a PowerPoint deck of his expectations. And he's a fireman, so he held some shift meetings and went through these. And it was interesting watching his peers react to this different view of him. And it was there was obviously a little bit of a transition like, hey, you used to be one of us. Now you're in charge of us kind of stuff. But overall, when I look at his success over the last several years, it goes back to those expectations he set really early on because it gave him common language with the people that he supports and leads and be able to say like, hey, you know what? These are the expectations. I'm holding you accountable to them. And when you choose as an employee to act outside of those expectations, there's consequences, right? Just like anything in life. I love that setting that up from the very beginning and having it be clear. And the gatekeeper is such a good idea. If that's something that you can afford budget-wise for somebody moving into that, that's great. What if you can't afford that? What are some, you know, maybe some suggestions you have for a leader stepping into that role who doesn't have the financial backing to be able to create that kind of physical buffer? What are some other buffers that you've seen work?

**Meg Crosby:**

Yeah, I mean, I think it's just really thinking through what that filter looks like. And, you know, if you're changing roles, you have to set expectations for yourself as well. What is your scorecard? What do you need to accomplish? How can you make sure that you sharpen your focus to be exclusively focused on those things and tune out the noise? And so some of that is just the self-discipline and the self-awareness to understand that that is going to happen. And also create a stop doing list. You know, I love this notion of when you're leveling up to a new role, you can't do all the things that you were doing before and the new role. What are you going to stop doing and who's going to do those things? And be very explicit about claiming that time and offloading those responsibilities. I think those are some ways that people can do that. You can set up email filters, use technology to help with that as well. But I think really important also to defend your boundaries. And when people come to you who are used to coming to you, but now may be jumping the chain of

command to send them back to where they're supposed to be to have those conversations. And you can do that in a thoughtful way. And eventually they'll, you know, that habit will break.

**Shari Simpson:**
Yeah, and if they really were your peers, they should understand that. I mean, sometimes it's difficult, like you said, but, you know, if they really are your peers, they should understand that. You know, you talked a little bit about technology. I want to dive into that a little bit. So many times when we focus on the word innovation, we think just about tech, right? We associate innovation with technology. I think innovation is a much broader topic and there's definitely the human side of leadership transition and innovation. How have you seen that? How have you seen kind of that concept of innovation brought to these leadership transition moments?

**Meg Crosby:**
Well, I think we are doing so much more in the wake of a leadership transition than we ever used to. And, you know, we talked at the top of the podcast about personality testing and leadership style. There are so many tools out there, so many assessments. So many instruments that leaders can take to understand themselves, to be coached, to know what their preferred style is and how they lead. So I think more than ever, I think that's been probably one of the biggest innovations that we've had, you know, in the last 10 or 15 years is just bringing all of these instruments to bear to help us understand how we lead and how others respond to our leadership. And so I think that's probably the biggest thing I would say.

**Shari Simpson:**
We went through a process several years ago on the HR team where we did CliftonStrengthsFinder. And it was really, it was a fun activity. It was a good discussion. And a lot of people in HR have taken a lot of assessments. So, you know, you probably could ask us, you know, what's our disk? What's our Enneagram? What's our, you know, CliftonStrengths? We probably can tell you all the things. But what was great about it is that they created these cards that sit on our desk that are our top five strengths. And it was so great because

then we could kind of walk around and have that visual reminder of like, oh, hey, this person's strength is strategy or this person's strength is empathy. So, you know, if I need to get a project done, how do I leverage some of these different strengths in the room to succeed? So I love that recommendation. I think sometimes we focus on those tools not in the right ways, right? We check the box or like, hey, you met our criteria as to how we think leaders in our org should work, but there's so much more you can use those tools for. So I love that you mentioned that.

**Meg Crosby:**
I would add one more thing. My favorite, I always say it's going to be on my tombstone, but my favorite quote is structure follows strategy. And so when we think about leadership transitions, I think it's really important to anchor those in the strategy of the organization or the department, depending on what kind of leadership role you're taking on and thinking a lot about what kind of leader is needed to execute on that strategy and putting the right person in place based on those strengths. So if you're getting ready to ramp up growth, you need someone who's got some business development and sales experience. You know, that's going to be really important. If you are looking to build out operations, you need somebody who's a process-driven person. So there are these different considerations just depending on the strategy. So I think the strategy is the North Star. And then you layer in and find the leader who has the strengths that can take you to that next level.

**Shari Simpson:**
Such good advice and how to think about your leadership pipeline and succession planning a little bit differently. How do you wrap in an understanding of leaders who are coming to it that might have, they might be in a different generation than the team, right? So you have some generational preferences there. They might be a neurodiverse leader. I think those are things we don't talk enough about because they bring some unique skills to the table that unfortunately don't fit kind of the mold that we think about. How do you personalize onboarding for that specific group?

**Meg Crosby:**

That's a great question. As far as generations, right now we have multiple generations in the workforce and there has been so much change because of technology that it is really interesting to see these generations getting along. For the first time in history, if you think about the history of work, we always worked on sort of an apprentice model. You know, there was someone coming into a business to learn the business from someone more senior and more experienced and probably older as well. And so that model has existed for thousands of years. And suddenly with the advent of technology and our use of technology and the internet and all the ways we use technology and systems, for the first time in history, our more senior generations are learning from the more junior generations. And that's created an interesting dynamic in the workplace that's leveled the playing field a little bit. But I think it's also, it's also we also live in an instant gratification culture. And so some of our younger employees who are really adept at using technology are impatient with how long it takes to actually build expertise in a subject matter or to build expertise in a business or to build their reputation or their credibility or their book of business. And so I think for the senior people, it is great to embrace the learning that they can get from junior folks, especially as it relates to technology. And for the junior folks, it's really important to remember that the person that you might be teaching to use this technology has a lot of wisdom for you to draw from that is analog, and that there's no substitute for time spent with these folks, and you'll learn so much from them. So I think as far as generations go, that's sort of one of the issues we're seeing. With neurodivergence, it really is interesting. I think that just goes back to what we always tell leaders, which is the most important thing you can be is self-aware, is know yourself. Work. And the workplace doesn't change because you operate in one way or another. We were just talking about work styles and everybody's got a different work style. So I think your neurodivergence can be both an asset. It certainly can be an asset, but it can also be a hindrance. So it's just figuring out how you can operate in the culture, in the workplace, based on whatever your neurodivergence is, what roles work for you, what ways of working work well for you, and explain those to your colleagues, ask for grace if you need to, and tell them where your superpowers are with your

neurodivergence and where they should deploy those. So I think it's just being self-aware and helping people learn how to work with you. What doesn't work is expecting everybody to work around your style. That doesn't work for any of us, regardless of our style. So you've got to take the ownership of yourself and help people figure out how to work with you.

**Shari Simpson:**

I love that. And it's like you mentioned it, everybody has to figure out that work style. So it doesn't necessarily matter your generation or if you're neurotypical or neuro spicy as some people like to put it. Yeah, you got to figure that out what your style is and how it fits in the organization. You know, as we wrap our conversation, I have one last question for you, and I think it's a big one. But if we fast forward, right, 10 years, four years, five years, how do you see the role of HR evolving as it continues to help set leaders up for success? especially because we have, you know, this rapid rise of AI integration in the workplace where I think we're, we quite haven't figured out in most organizations, the strategy of using AI. We're just really trying to understand the tech and use it quickly. We still have our hybrid models, which I think are going to exist for a while. And who knows what the next evolution of work is going to be? You know, I see our younger generations coming in and pushing in such really great ways around development and opportunities for skills development. And I see that also changing how we're thinking about roles internally, right? Can they be a little bit more flexible? Can they lean into skills? How do we create that gig economy inside of our own organizations? I know I just, that was a very big, long-winded question, but I guess the bottom line is, you know, where do you see HR in the next five years really supporting the change of how we build our leaders up?

**Meg Crosby:**

Now, I think that's a great question. So I'm thinking a lot right now about AI and how it is going to disrupt the workforce. And the things that I'm thinking about are as it relates to leadership and management. When you think about taking an individual contributor, for example, and making them into a manager, a people manager. There are two skill sets at play there. One is, is they've been a successful individual contributor in a particular function. And

now we've added the people leadership skills onto those folks. And what I think is going to happen is that our functional expertise is going to be less important because AI is going to be the functional expert in everything, then that will be less important than our people management skills, the things that involve empathy, the ways that we help guide people and train people to use AI. I think that's really going to be mission critical for HR. In education, we've moved to, we're moving to a project-based learning model. And so we talk about, in project-based learning, we talk about, the teacher becoming not the, the old model is the teacher as the sage on the stage. You know, you have the person in front of the class giving a lecture and this new model is the guide on the side, someone who is more of a facilitator to help guide employees, help them work with AI tools to get to the end result. So I think we're going to see a lot more coaching leadership style, more facilitation, and less dependence on expertise or I'm the smartest person in the room.

**Shari Simpson:**

I love that. I could not agree more. Meg, this was such a great conversation focusing on, you know, leadership development and all the things that we have to think of to support our pipeline and succession planning. So thanks for taking a few minutes of your day to chat with me.

**Meg Crosby:**

Thank you so much, I enjoyed it.

**Announcer:**

I hope you enjoyed today's episode. You can find show notes and links at thehrmixtape.com. Come back often and please subscribe, rate, and review.