

# From Role to Role:

## Effective cross-boarding for the workforce of the future

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### What is cross-boarding?

Cross-boarding is an HR discipline that focuses on facilitating internal transitions for employees who change roles or functions within the same organization.

While onboarding is typically about integrating new employees into the organization, cross-boarding targets existing employees and focuses on them being well-equipped for new challenges, whether it's a new department, a leadership role, or a specialized position.

The goal of cross-boarding is to create a structured and efficient transition where the employee can quickly adapt to their new responsibilities and teams. Therefore, it is also an incredibly potent strategic effort for organizations that want to retain and develop their talent pool.

### Why do we know so little about it?

Regardless of its relevance in modern HR practice, cross-boarding is still relatively unexplored in both research and business literature. While there is extensive literature on employee onboarding and offboarding, cross-boarding still lacks the same in-depth attention. Cross-boarding is at the intersection of several established HR disciplines, and therefore the topic is overlooked in favor of more limited topics such as onboarding or talent development. Cross-boarding therefore also easily becomes a grey area, where the responsibility for transitions between roles 'flows' between different HR functions, without becoming an independent effort.

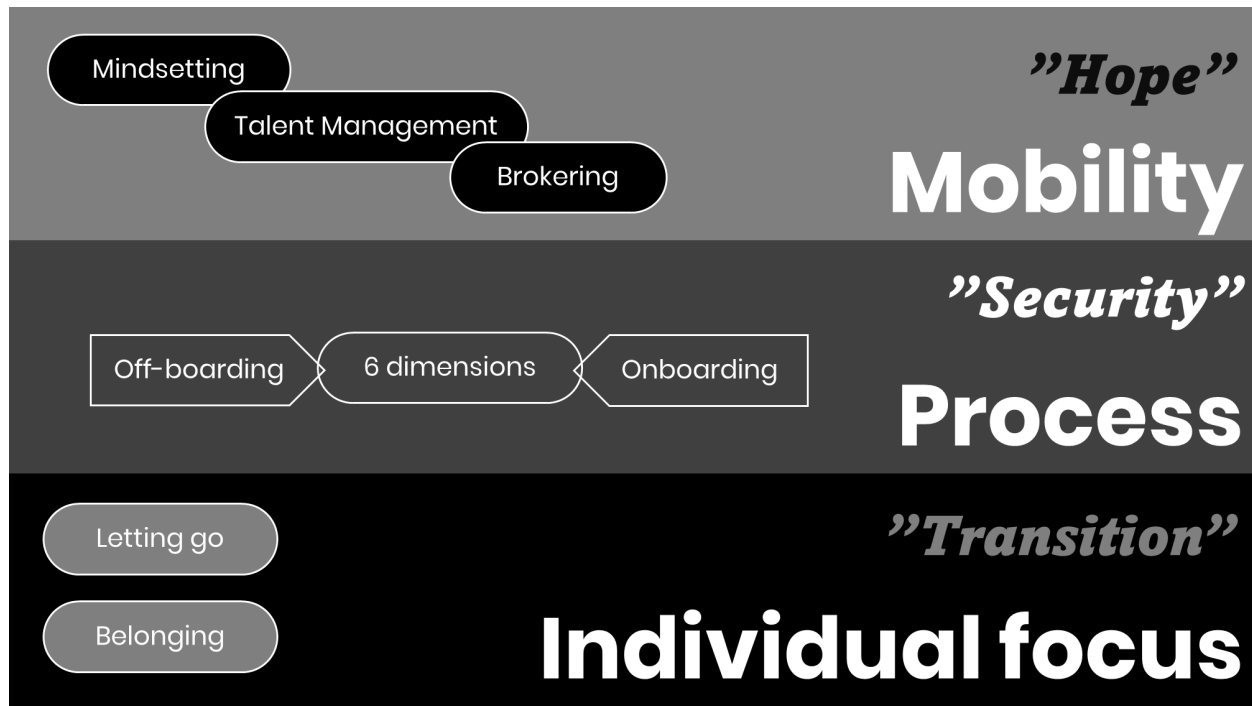
The sparse literature means that there is great potential for developing both theoretical and practical knowledge in the field. There is a need to create a deeper understanding of how cross-boarding can be structured and how it can be adapted to different types of organizations and employee profiles.

### An overview

In the existing literature, cross-boarding is typically referred to as one of two things. Some of the few available sources touch on cross-boarding in relation to talent retention and career development, and some articles describe cross-boarding as a strategic opportunity to leverage and develop existing employees. A few textbooks and articles from HR journals also outline cross-boarding as a way to create faster integration and increase productivity for employees who change roles internally. Nevertheless, in a world where organizational flexibility and employee development are constantly on the agenda, it is becoming increasingly important to manage internal shifts and transition processes in a structured way.

### Three strategic areas

Cross-boarding, as a strategic discipline, addresses three main areas that an organization can prepare and develop: *internal mobility*, *a cross-boarding process*, and *the ability to keep an individual focus on 'the person who changes roles'*.



### Internal mobility as a culture

Internal mobility refers to the ability for employees to move between different roles, teams, or departments within the same organization. This can include **horizontal movements**, where employees shift to similar positions, and **vertical movements**, where they advance to higher levels of responsibility. Internal mobility is a powerful tool for organizations looking to retain talented employees, as it offers a way to develop skills and keep the work experience dynamic and challenging. By making internal mobility accessible to employees, the organization creates a culture where career development does not necessarily require a move to another workplace, but can instead be done through the exploration of new opportunities internally.

When an organization supports internal mobility, it creates hope and perspective in employees because it signals room for personal and professional development. It shows a willingness to invest in employee growth and well-being, which can increase employee satisfaction and loyalty. Knowing that one can gain new skills, expand one's network, and potentially advance without having to leave the organization can create a sense of security and motivation that can strengthen employee engagement. At the same time, internal mobility helps to create a more agile and resilient work environment, as the organization gains employees who understand different parts of the business and can adapt to change.

Internal mobility as a culture and as a cross-boarding discipline can be supported by:

1. A mobility mindset for the individual manager
2. An integrated talent management practice
3. A structured approach to 'employee brokering'

### **1. A mobility mindset**

Of course, strengthening mobility requires both strategic and practical planning and close collaboration with HR to ensure that there is both a clear process for internal mobility and that all employees have access to information about possible career paths. But it just as much requires a certain attitude on the part of the individual manager.

Leading with a mindset that supports internal mobility requires an open and generous approach, where you as a leader are willing to give up your best employees when they are ready for new challenges in the organization. This involves seeing talent as dynamic and constantly evolving, which means that employees may want to move in new directions in the long term. A successful leader in this context is not possessive of his talents, but sees it as a victory when employees choose to stay with the organization, even if it means moving to other departments.

This type of leadership requires a deep appreciation of learning, knowledge sharing, and cross-disciplinary collaboration. A leader with this mindset understands that success is not necessarily measured in individual performance, but rather in how the entire organization develops and becomes stronger over the years. Letting go of talented employees requires courage and a long-term perspective. Thinking long-term doesn't just invest in the individual team, but in a culture that fosters sustainable growth and creates an attractive workplace where employees feel safe and motivated to grow.

### **2. Talent management**

The Cross-boarding discipline crosses over the entire professional field we call *Talent Management*. Both disciplines focus on employee development and retention of talent within the organization. But where talent management is about understanding the organization's talent needs, identifying, developing and retaining key employees, and developing programs and pathways for talent development – Cross-boarding is about creating a practice that enables a smooth transition when an employee changes roles or departments. This synergy enables the organization to make optimal use of existing competencies, while allowing employees to develop in line with the organization's needs.

### **3. Brokering**

Employee brokering is a process in which managers or HR professionals act as a "mediator" for employees by matching their skills, interests, and development goals with new opportunities within the organization. This may involve identifying talent who has the potential to contribute in other teams or departments, and actively facilitating their transition into these new roles.

Brokering is about making connections and opening doors across the organization, allowing employees to expand their skills and experience without leaving the company. This process is closely linked to Cross-boarding, as brokering is often the first step in a Cross-boarding process – it is through this that the employee is introduced to new opportunities, after which Cross-boarding ensures a structured transition.

## The Cross-boarding process

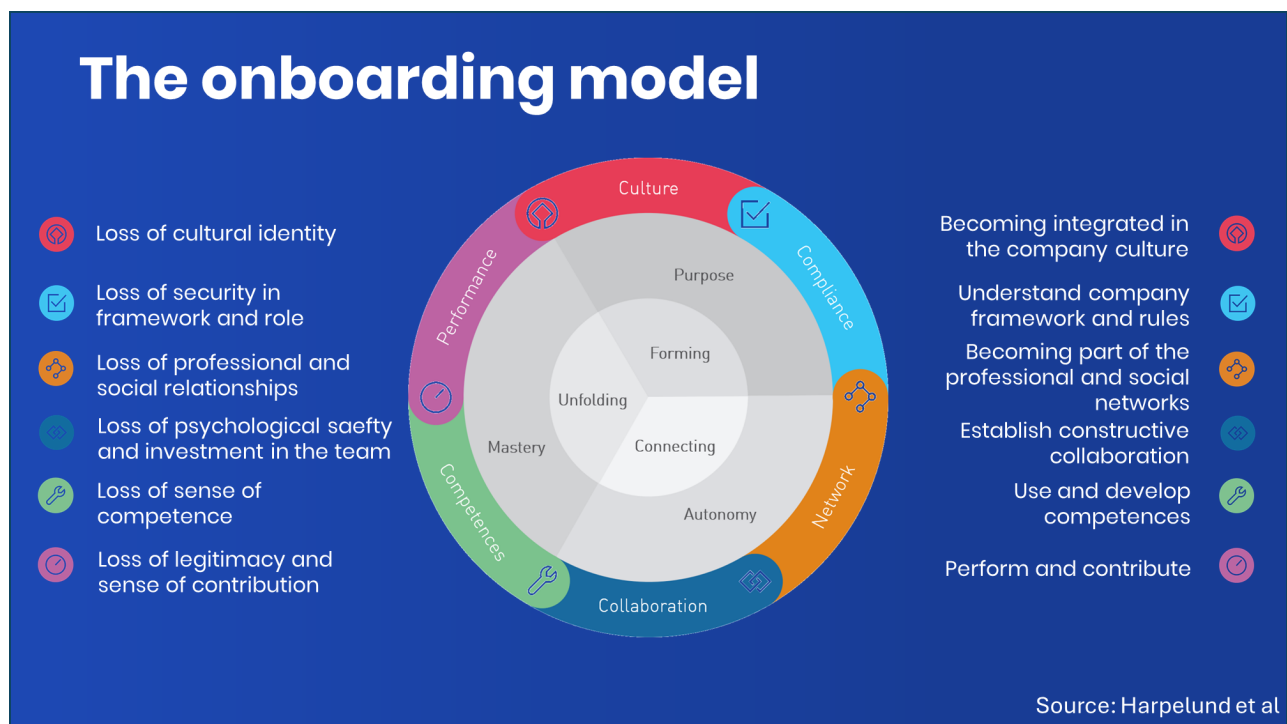
The Cross-boarding process occupies a unique position sandwiched between off-boarding and onboarding. While off-boarding focuses on finalizing an employee's engagement in a given role, and onboarding on integrating a new employee, Cross-boarding aims to facilitate an internal transition for employees transitioning to new roles or departments within the organization. This process requires that you as an organization have an eye for both sides of the transition – both what the employee leaves and what they step into.

To create an effective Cross-boarding experience, it's crucial to understand that the employee is going through a form of "mini-offboarding," where they have to say goodbye to the familiar setting and relationships from their previous role. This can involve an element of loss, as the employee may have been part of a well-known team and an established culture where they have built relationships, routines, and workflows. At the same time, the employee must go through a form of "mini-onboarding" in their new role, where they must be introduced to new colleagues, understand new procedures, and adapt to a different culture or work context.

Balancing these two sides of the transition requires a structured approach, where Cross-boarding is not just about a formal move from one department to another, but about supporting the employee through a holistic process. If the employee is to thrive in his or her new role, it requires that both the end of the old and the integration into the new receive attention. To ensure that the employee not only has the necessary practical knowledge to perform his or her new role, but is also emotionally and socially ready to take on the new opportunities and challenges.

### 6 dimensions as a structuring framework

To ensure a structured and successful cross-boarding process, the organization can use six key dimensions that are taken from the onboarding discipline and are often used in modern onboarding practices: culture, rules, networks, collaboration, competencies, and results.



These dimensions form a holistic framework that makes it possible to take care of both the termination of the employee's previous role and the integration into the new one. By building the process around these six aspects, the employee gets the necessary support to handle the transition in a balanced way. This not only ensures a meaningful end to the previous work area, but also a solid foundation for being able to thrive and perform at your best in the new role.

**1. Culture:** The employee goes from a familiar culture to a new one, and this transition can involve an emotional as well as an identity loss. By acknowledging the old culture and at the same time introducing the employee to the values and norms of the new department, a smooth cultural integration is ensured.

**2. Compliance:** Each department or role may have its own specific procedures and rules. The employee has to go through a potentially complex process of first dismantling old workflows and then learning the new rules that apply in their new position.

**3. Network:** When the employee leaves a team, they also lose an established network of colleagues and collaborators. Therefore, the Cross-boarding process must support the employee in building new relationships and becoming integrated into the new team's social structure, to strengthen their sense of belonging and sense of belonging.

**4. Collaboration:** The transition to a new department can also mean changes in the collaboration dynamics and roles the employee has previously had. It is important that they quickly gain an understanding of the new group's working methods and roles, so that they can find their place in the collaboration.

**5. Competencies:** When an employee changes roles, there may be a need to upskill or adapt their skills to the new requirements. The Cross-boarding process should include ways to raise awareness and evaluate the employee's competencies from the old job – and training and development plans that ensure that the employee has the necessary competencies to succeed in their new role.

**6. Results:** Finally, the employee must understand the new goals and success criteria that are specific to their new role. A clear definition of expectations and results allows the employee to focus and motivate themselves from day one. On the off-boarding side, a structured approach to tasks that need to be completed or handed over unfinished can create security in the transition.

These six dimensions can be used as a structure to support a successful transition, where the employee can both say goodbye to the old and embrace the new.

## **Culture in Cross-boarding: A Toolbox for the Leader**

Culture can be one of the most subtle, but also one of the most influential aspects of an employee's experience of their workplace. When an employee changes roles or departments, a "loss of cultural identity" can occur, especially if they have had a strong attachment to their workplace norms, values, and workflows.

As a manager, you can help create continuity and security in this transition by facilitating a conscious process where the employee can both conclude and integrate into new cultural contexts. Below you will find specific activities that can help you deal with the cultural aspect of Cross-boarding.

### **By Offboarding: Support the Employee in the Culture End**

#### **Ready-to-Journey Process:**

Empower the employee to reflect on the essence of the culture they're leaving. What have they particularly appreciated? What values and habits will they take with them? This can take place as a guided reflection exercise or a dialogue where they put into words what they take with them from the previous department.

#### **Change dialogue:**

In particular, if the cross-boarding is to be seen as part of an organizational change, it can be effective to invite the employee to a conversation about the person's experience of the change. Ask how they have experienced their time in the previous department and where they see themselves now. This dialogue can create clarity and close a chapter in a good way, and create mental clarity for a new role.

### **When Onboarding: Integrate the Employee into the New Culture**

#### **Expected and welcome:**

Make the employee aware that they are both expected and welcome in the new team. Plan a welcome ceremony or a smaller celebration to mark that they are officially part of the team. It can be a lunch, a coffee break or a welcome greeting on the intranet.

#### **First weeks on the job timeline/plan:**

Prepare a timeline or plan for the first few weeks, introducing the employee to key activities, meetings, and key people. This can help them understand the rhythm of the team and get a feel for the culture in practice.

#### **A new culture process:**

Hold a session where the team introduces the employee to the culture of their new department together. Where do they come from? What values and habits do they value? Here you can help create a common understanding and dialogue about what is expected and appreciated in the team.

#### **A learning log:**

You can encourage the employee to keep a learning log, where they note observations, things they wonder about, and questions related to their new role. It can strengthen their curiosity and commitment to getting to know the culture, and you can use the log as a starting point for ongoing dialogue.

### **When Cross-boarding Happens in Connection with Organizational Changes**

#### **The cultural ambition in the change:**

If Cross-boarding is part of a larger organizational change, it is important to remind the employee and the team of the cultural ambition that lies in the strategy. Talk about what each person can contribute to support the new direction and how the previous experiences can strengthen the culture in the new context.

As a leader, your role is to ensure that the transition 'from and to' a culture takes place in a way that creates understanding, belonging and a sense of continuity in the employees' movement in the organization.

## **Compliance, rules and frameworks in Cross-boarding: A Toolbox for the Leader**

Rules and structures form the backbone of any work role, and they create a necessary sense of security in the employee's framework and role. When an employee moves to a new position internally, a "loss of security" can easily occur. Although known rules and procedures may not change significantly, the practice around them can easily do so. In order to support the employee in this transition, it is important that the manager works with both the end of the old framework and the integration into the new one. Here are some practical steps that can help create a smooth transition.

### **When Off-boarding: Support the Employee in the Farewell with Known Frameworks**

#### **Mental farewell and practical document:**

To make the transition easier, the employee can create a "What is it like to be me" documentation, where they describe the special frameworks, processes and systems they have worked with in their previous role. This works both as a mental farewell, where the employee gets to put words to what is known, and as a practical guide to their successor.

#### **Pre-preparation:**

Ask the employee to make a list of questions or topics that the person has about the new position. This can help the person prepare mentally for the framework and processes to get to know, and it gives the manager a good entry point into where the need for support will be greatest.

### **When Onboarding: Create Clarity on New Rules and Systems**

#### **Prepared presentation of systems and processes:**

As a manager, you can prepare a presentation of the most essential systems and processes in the new role. Give the employee a thorough introduction to the most important workflows and systems, so they have a clear framework to navigate from the start. This can also include an overview of documentation tools and standard operating procedures specific to the new area or department.

#### **Role dialogue:**

Have a dialogue with the employee about their new role description and the expectations associated with the position. Provide space for questions and discussion about how the old and new frameworks differ. Here, you can clarify both the manager's and the employee's expectations, which is essential to create clarity and security in the new structures.

### **When Cross-boarding Happens in Connection with Organizational Changes**

#### **Make something of the differences, strive for a best-practice:**

If Cross-boarding is part of an organisational change, there may be significant differences between the old and new organisational structure. Be sure to highlight these differences and use them as a learning opportunity. Encourage the employee to contribute with their experience from previous roles, so that you can work towards best-practice together within the new framework.

By creating clarity about rules and processes and providing the opportunity to say goodbye to the old framework, you as a manager ensure a transition where the employee can experience clarity and security about navigating the new structures.

## **Networking in Cross-boarding: A Toolbox for the Leader**

Networks, both professional and social, are a crucial dimension for both the employee's well-being and success in a role. When an employee changes positions internally, they may experience a "loss of professional and social relationships," as they must leave familiar colleagues and establish new connections. To facilitate this transition, the manager can actively support the employee in anchoring old networks and integrating them into new ones. Here are concrete measures that can help the manager support the network dimension in the Cross-boarding process.

### **By Offboarding: Support the Employee in Anchoring or Saying Goodbye to Old Networks**

#### **Relationships Worthy of Preservation:**

Ask the employee to identify the relationships they want to preserve that they believe may be of value to them in their new role (e.g., former colleagues, collaborators, or mentors). Help the employee plan how and how often they will maintain contact with these key people. This can be through regular coffee meetings, participation in joint professional networks, or by setting aside time for ongoing sparring.

#### **Hello outside world: I'm changing!:**

You can encourage the employee to announce their job change to the most important stakeholders inside and outside the organization. This can be via an internal email, SoMe platforms, or an informal message to professional networks. This announcement creates an official end to the previous role and a potentially ritual act for the person in relation to their relationships.

### **Onboarding: Create opportunities for new network relationships**

#### **Presentation of our professional and social networks:**

As a manager, you can help the employee get an overview of the professional and social networks that the new colleagues participate in. This can be anything from project groups and knowledge-sharing meetings to more social events. Provide an introduction to these opportunities and discuss how the employee can contribute and integrate into them. Also ask about what they might take with them from their previous networking experiences.

#### **Identify Key Contacts:**

You can work with the employee to make a list of the people that you and the person feel are important to their success in the new role (internal and external collaborators, mentors, team members, etc.).

#### **Arrange a job-change buddy:**

Assign the employee a "buddy" who can be a permanent contact person for the first few weeks and who can help with the introduction to new colleagues and work communities. A buddy serves as an important support for understanding both the professional collaboration and the social dynamics in the new workplace.

### **When Cross-boarding Happens in Connection with Organizational Changes**

#### **Reboot and dialogue about our networks:**

If Cross-boarding is done as part of an organizational change, it may be necessary to "reboot" the networks. Use this as an opportunity to review which networks should be retained and which should be developed in light of the new structure. This can strengthen the employee's understanding of how the networks support the new culture, strategy and practice - and how they can actively contribute to this development.

#### **Mirroring process:**

To help the employee maintain a sense of continuity, the manager can put them in touch with others who are transitioning to similar roles in the organization and with whom they can spar. By establishing a form of "mirroring" between old and new colleagues, the employee can get support and inspiration that helps them to take their networking experiences into the new role.

As a manager, you contribute to the employee's experience of attachment by supporting a meaningful goodbye to old relationships and creating opportunities to integrate into new networks.

## **Collaboration in Cross-boarding: A Toolbox for the Leader**

The collaboration dimension in Cross-boarding is about ensuring that the employee can create good collaborative relationships in their new role and quickly build psychological safety in the new team. During internal transition, a "loss of psychological safety" can occur, especially when the employee leaves a team where they have invested time and energy, and where they feel safe. As a manager, you can help the employee both to end the relationships with the old team and to create constructive collaborative bonds with the new one. Here are some concrete activities that can support this process.

### **When Offboarding: Support the Employee in the Farewell with His Team**

#### **Pro activity: Self-presentation to the new team**

You can encourage the employee to make a short presentation of themselves that can be shared with their new team. It can be a presentation that talks about their experiences, strengths and motivations. This can help the employee prepare mentally for the transition and prepare a clear – perhaps new – positive narrative they can take into the new collaboration.

#### **Recognition and farewell:**

Hold a short farewell session where the old team gets the opportunity to thank and acknowledge each other. It can be an important mental conclusion that helps the employee move on with a feeling of having 'stood strong'.

#### **Team culture: The best team experiences**

Invite the employee to reflect on the best experiences they have had working with their previous team and what they want to bring with them into the new position. This can both function as an appreciative process, and create concrete ideas for what could be good to put into play in the new team.

### **When Onboarding: Create Constructive Cooperation and Psychological Safety**

#### **Pro activity: Presentation from the new team**

Ask the new team to prepare a short presentation of themselves to their new colleague. It can be an informal introduction where they share their work roles, interests and maybe a little about how they work. This can help the employee get to know colleagues better and get a sense of the team's dynamics.

#### **Psychological safety: Informal team sessions in preboarding**

Invite the employee to unofficial team sessions already in the preboarding phase. It can be an informal coffee break or a joint lunch meeting, where the employee gets the opportunity to meet colleagues in a relaxed environment and build a sense of belonging.

#### **Diversity dialogue:**

Facilitate a dialogue about diversity and diversity in the team. Provide space for the employee and team to express their different perspectives and strengths, fostering psychological safety and an open culture where everyone feels included.

#### **Managed process with models:**

Use well-known team or psychological-safety models from the organization to facilitate a team dialogue, where the team and the new colleague can learn to work together and the employee can find his or her new place. By basing the conversation on a model, the employee and the team get a common language and framework for collaboration.

### **When Cross-boarding Happens in Connection with Organizational Changes**

#### **The best team experiences:**

If Cross-boarding is happening as part of an organizational change, it can be effective to facilitate a process where employees share their ideas about the 'good team experience'. It can provide an insight into each other's approach to and values in a collaboration. At the same time, it is an act that acknowledges the environment from which the new colleague comes.

Your focus as a leader on psychological safety and openness can be the employee's ticket to a strong start and a better opportunity to contribute constructively to the collaboration in the new team.

## **Competencies in Cross-boarding: A Toolbox for the Leader**

The competence dimension in Cross-boarding is about ensuring that the employee can both use his or her existing competencies and develop new skills in the new role. However, when an employee changes positions internally, a "loss of perceived competence" can occur, as they may move away from an area where they felt safe and experienced. It is therefore important that the manager supports both the consolidation of 'old' competencies and the adaptation to the new requirements. Here are specific activities that can help the manager support that process:

### **When Offboarding: Support the Employee in the End of Previous Area of Competence**

#### **Guide to the next one: Subject and terminology handbook**

You can encourage the employee to prepare a professional and terminology handbook that can be left to his or her successor. By summarizing important concepts, processes, and workflows, the employee gets an opportunity to visit their own competency landscape, while at the same time leaving behind a valuable resource.

#### **Awareness-raising: Competency descriptions**

Have the employee make an overview of the competencies they have developed in their previous role and what they have achieved. This reflection can help them see the experience they bring with them and create awareness of how they would like to use these skills in their new position.

### **By Onboarding: Support Use of Existing and Development of New Competencies**

#### **Guide: Subject and terminology handbook**

Offer a professional and terminology handbook specific to the new department or role, which can provide the employee with a foundation of knowledge and increase the person's confidence in navigating the new professional requirements. The handbook can introduce them to the most commonly used terms, tools, and working methods in the new department.

#### **Avoid frustration: Competency development survey after 3 months**

To ensure that the employee does not become frustrated by a lack of development in the new role, you can conduct a survey after the first 3 months to clarify wishes and needs for competence development. This can give you a better understanding of what skills they want to develop and how best to support them.

#### **Provide Perspective: Introduction to Career Paths**

Support the employee in their long-term development by introducing potential career paths within the organization. Give them insight into how their new role can develop and what skills can take them further in the organization. This perspective can be motivating and create a stronger sense of belonging.

### **When Cross-boarding Happens in Connection with Organizational Changes**

#### **Common professionalism: Hold a competence day after 6 months**

If Cross-boarding is part of an organizational change, it can be effective to hold a competency day where the employee and the team can share knowledge and experiences after the first months in the new setup. This can give all employees a chance to share what they have learned and gain insight into common competencies and common perceived competence needs, which strengthens their professional anchoring.

By focusing on both the consolidation of 'old' competencies and the integration of new creators, you as a leader can create a transitional experience of mastery and positive challenge.

## **Results in Cross-boarding: A Toolbox for the Leader**

The results dimension in Cross-boarding is about ensuring that the employee can quickly understand and contribute to the expected goals in their new role. When an employee changes positions, they may experience a "loss of success and contributing" because they leave an environment where they had a clear understanding of their goals and tasks. To make this transition as smooth as possible, the manager can support the employee both in the end of their old role and in the integration into the new expectations. Here are some concrete activities that can help support the performance dimension of the Cross-boarding process.

### **By Offboarding: Support the Employee in the Completion of Tasks and Goals**

#### **Conclusion: Agree on Finishes and Goals**

Help the employee round off their tasks by creating a clear plan for completion and goal setting of tasks. Review together what tasks can be completed before the transition and how their contributions in the previous role have made a difference. This creates a sense of accomplishment and clarity about what they have contributed before taking the next step.

#### **Unfinished: Good hand-over of ongoing tasks**

Make sure that ongoing projects are thoroughly handed over to the colleagues who will take them over. This can include documentation and short meetings where the employee shares the status and any challenges in the projects. A good hand-over ensures that the employee can shift focus to the new role without worrying about what they leave behind.

### **By Onboarding: Support the Employee in Performing and Contributing in the New Role**

#### **Hit-the-ground-running: Goals, workflows and key projects**

Be ready to introduce the employee to the most important goals, work processes and projects in their new position. A clear structure from the start gives them the best conditions to quickly understand where they can contribute and start creating results. Give them access to workflows and tools that can support their performance.

#### **Focus: Set goals with the employee**

Sit down together and define concrete goals for the new role. Agree on both short-term goals that can be achieved within the first few months and longer-term goals that support employee development. This common goal creates clarity and gives the employee a benchmark for where they should start their efforts.

### **When Cross-boarding Happens in Connection with Organizational Changes**

#### **Reflection and progression: Feedback check-ins with a focus on the process**

If Cross-boarding is done as part of an organizational change, it can be effective to increase regular feedback meetings for a short period of time. Especially with a focus on both the process and the results achieved. Here, the employee can reflect on their progression and receive guidance where needed. Feedback check-ins support the employee's motivation and help them adjust their approach if challenges arise.

By taking care of both the end and the start in the result dimension, the manager can ensure that the employee has a strong transition to his or her new role, where others may also notice the 'new' in a positive way. Focusing on clear goals and feedback from the start makes it easier for the employee to perform and feel valuable in their new position, which can be a crucial energy supply when changing jobs.

## **The individual focus**

The last main area of the cross-boarding discipline is about keeping an eye on the individual's experience and progress.

While a successful Cross-boarding process depends on an overall mindset and well-planned processes, it's important to remember that every employee is different. Their experiences will vary significantly – and their different individual needs can place very different demands on us to guide them through the process.

A number of factors affect how a Cross-boarding process is perceived by the individual: *whether the change is self-chosen or forced* (e.g. in connection with an organizational change), *where the employee is in their life and career*, and not least *their personal preferences and feelings in relation to change*.

### **For those of you who are leading 'someone who is going to disembark'**

When you as a manager have to say goodbye to an employee who is going to move on in the organization, it is important to adapt your leadership style and attention to the employee's individual needs and character traits. Understanding and respecting the individual's history, relationships, and how they experience change can make the transition easier and more meaningful.

### **Respect the employee's history and relationships**

The manager should acknowledge the history the employee has built up in the department, as well as their personal relationship with the manager himself. A shift can be emotional, especially if the employee has made a special effort or has been part of the team for a long time. It can help to acknowledge this story through a farewell interview, where the manager expresses gratitude and puts into words what the employee has contributed. This creates a dignified end and shows that the employee's time and effort in the team has had value.

### **Be Aware of the Employee's Attachment Needs**

Employees' needs for attachment can vary significantly, which can be seen in their preferences for independence or proximity. As a manager, you can think about whether the employee is a person who thrives best with a high degree of independence, or whether they need close contact and support in connection with the transition. For employees with a need for closeness, it can be valuable to offer ongoing follow-ups and conversations during the break-up period. Conversely, employees who thrive on a high degree of autonomy may appreciate more freedom and self-management in this process.

### **Adapt Communication to the Employee's Style**

Another important attention is the employee's communication style, including whether they are introverts or extroverts. An extroverted employee may benefit from more open and direct conversations, while an introverted employee may need more time for reflection, a more subdued conversational style, or more things in writing. Adapting communication to the employee's personal style can create greater understanding and confidence in the process and help the employee say goodbye in their own way.

### **Assess the Impact of Change on the Employee**

When a change occurs as part of a larger organizational change, the impact of the change can vary greatly from person to person. Consider how long the employee has been in the department and where they are in their career. A new employee or someone in the middle of a career change may be more affected by the change than an experienced employee, who may see it as a natural part of their development. Well-planned support that takes into account how big the change feels for the individual can potentially accommodate 'big' negative emotional reactions.

## 2 farewell interviews

We recommend that you as a manager schedule two conversations with the employee. The first conversation can be based on the six dimensions – culture, rules, network, cooperation, competencies and results – to create a holistic conclusion. Here are potential attentions and questions for each dimension of a farewell interview:

- **Culture:** "Thank you for [your contribution] to culture" & "What's the most important thing you take away from here?"
- **Rules:** "What is the most important thing to pass on to others about your work?" & "What do you think will be most different in your new job?"
- **Networking:** "Thank you for [your contribution] to our social interaction" & "Which collegial relationships will be important for you to hold on to?"
- **Collaboration:** "I think you can benefit from being aware of [this quality of yourself] in the new team you're going to join" & "What have you learned here about collaboration, for better or worse, that you're taking with you?"
- **Competencies:** "I can see that you have developed while working here, especially [these competencies]" & "What do you think will be most important for you to learn for your new role?"
- **Results:** "Thank you for [the results] you have helped create here" & "What are you most proud of having achieved here?"

The second conversation can be more concise and focused on the change process itself. Three key questions for this conversation could be:

- "How have you experienced the transition so far?"
- "Are there any special challenges where you want extra support?"
- "What do you think about your goals and opportunities going forward in your new role?"

### For those who are leading 'someone who is going on board'

When you as a manager are to receive an employee who changes internally, it is just as crucial to adapt your leadership style and attention to the employee's unique needs and character traits, even if you of course do not have the same history to start from.

#### Respect the employee's history and relationships

It is important that the manager recognizes the employee's experience and baggage from their previous role, as well as their personal relationships. Asking about this can help them find a good balance between the past and the new beginnings and strengthen the sense of continuity and meaningfulness in their careers.

#### Be Aware of the Employee's Attachment Needs

The employee's attachment needs can have a big impact on how they adapt to the new team. As the manager, you can look for early signs that indicate the employee's attachment patterns, which range from a need for great independence to a need for close support and attention. Employees with a strong attachment need may thrive on regular check-ins and ongoing feedback, while employees who prefer autonomy may benefit from more freedom and self-management.

#### Adapt Communication to the Employee's Style

Employees have different communication preferences, even when they arrive at a new workplace, and these affect how they best receive information and feedback in the new role. Extroverted employees often appreciate open dialogue and quick feedback, while introverted employees may need more time and more things in writing. By aligning communication with the employee's style, the manager can create an onboarding where the employee feels heard and supported in a way that matches their personal needs.

## Assess the Impact of Change on the Employee

If you receive an employee in connection with an organizational change, there will be a big difference in how profound the change feels. If the change occurs as part of a larger organizational change, and the change is involuntary, the employee may feel greater insecurity because the process is out of their control, and potentially "resistance" to being forced into something. In an involuntary cross-boarding, the manager needs to pay more attention to the person's reactions and how they understand the change. Does the person like and/or trust the change?

If the employee is new to the company or early in their career, the transition may seem more extensive. In these cases, it can be important to provide extra support and focus on creating a sense of stability and future perspective. Understanding how big the shift is experienced and what impact it has on the employee's job satisfaction and motivation can help the manager ensure a good and stable start.

### 1 Pre-boarding and 2 Onboarding Calls

To ensure a good start for the employee, you as a receiving manager should schedule three important conversations in the cross-boarding process: *a pre-boarding interview before the start of the job, an in-depth onboarding interview during the first week, and a follow-up interview after the first month.*

#### Pre-boarding interview

This interview takes place before the employee officially starts in the new role. The goal is to welcome them and create a sense of security around the transition. Here, the manager can present the framework for the role and open up for questions, so that the employee has a clear expectation of what awaits them. This helps build the relationship and allows the manager to gain insight into the employee's preparation and needs.

Three key questions for this conversation could be:

- "How have you experienced the transition so far?"
- "Are there any special challenges where you want extra support?"
- "What do you think about your goals and opportunities going forward in your new role?"

#### Onboarding interview within the first week

Within the first 2 weeks, the manager should hold a thorough conversation based on the six dimensions: *culture, rules, network, cooperation, competencies* and *results*. This interview aims to give the employee a holistic understanding of their new role and the department. The manager can review each area and create an open dialogue where the employee can ask questions and share their thoughts on the different aspects of the transition. Suggestions for potential attentions and questions for each dimension could read as follows:

- **Culture:** "The essence of our culture is [especially this]." & "What can we learn from the culture you come from?"
- **Rules:** "The most central systems and processes are [especially this one]." & "What do you think will be most different from the practice you come from?"
- **Networking:** "The most important networks and relationships I think you should become a part of are [especially these]." & "What are your expectations for the social life in a workplace?"
- **Collaboration:** "In the team you're going to start in, you need to know [especially this one]." & "What do you know is important to yourself when you enter a collaboration?"
- **Competences:** "[Especially these] competences, we are very concerned that you bring into play here." & "What do you think will be most important for you to learn for your new role?"
- **Results:** "What are you most proud of having achieved in your old job?" & "The most important success criteria in your new job are [especially this one]."

### **Follow-up Onboarding Interview After the First Month After**

the first month, the manager should follow up with a check-in to hear how the employee experiences their new role. This can be a short conversation if everything goes as planned, or a more clarifying and solution-oriented conversation if challenges arise. Here, the manager can support the employee in finding solutions and provide feedback, so that any problems are addressed quickly and the employee feels safe and supported in their development.

### **Especially for you who lead a team**

Even when only one employee cross-boards, you as a manager may well experience being left with an "amputee" team, where both roles and relationships suddenly feel disrupted. Losing a team member doesn't just mean that one person leaves the group—but affects the entire team's dynamics. Psychological research shows that established team dynamics are often reset when substitutions occur, even if it is only one person. This can lead to a renegotiation of trust, changes in team conflict management, and a new challenge to everyone's sense of shared obligation. The sense of commitment and responsibility towards the team's goals and direction can waver, and team members can become insecure about their roles and goals if elements such as important knowledge, power, personal style, and the like leave the team with the person.

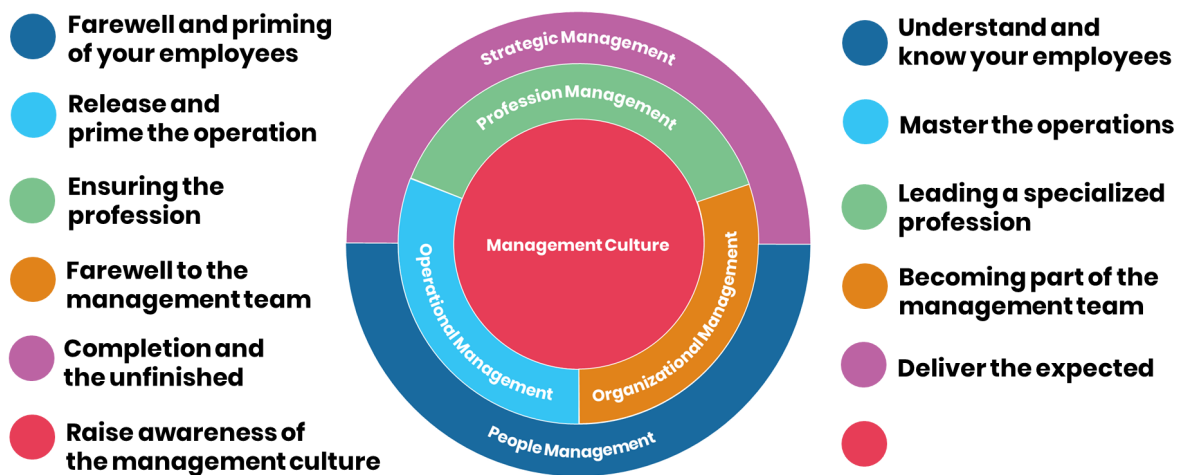
When Cross-boarding happens as part of a larger organizational change, employees may also experience feelings of guilt and shame – for example, if they see former colleagues lose their jobs or feel like they are leaving a team in a difficult situation. Doubts and uncertainty can arise about their own role and loyalty, and some may even feel a form of "survival guilt" because they have been given the opportunity to stay, while others have not. As a leader, it is important to create space for these feelings, so that the team as well as the employee can process them and regain legitimacy in the new situation.

The same considerations apply when a new member joins the group. The existing team may experience feelings of uncertainty and they may experience that the overall dynamic changes, which requires the leader to work actively to rebuild trust, clarity and commitment in everyone. Recognizing this, and creating an environment where the team can continuously communicate and revisit their shared goals and responsibilities, can help reboot the team's internal 'processes', reduce turmoil, and ensure that everyone can be reconnected to each other and the common directions.

## Cross-boarding of Managers: Considerations and Dimensions

Cross-boarding of managers is in many ways a process with many of the same considerations that apply to employees – both when the manager leaves a role and when they step into a new management function in the organization. The six dimensions can also be used as a starting point for the manager's transition, but with some crucial differences that take into account the manager's particular areas of responsibility.

### 6 leadership disciplines



#### (Culture) Management culture

When a manager cross-boards, integration is not just about the department's culture, but about understanding and adapting to the area's overall management culture. Here, it is important that the leader is introduced to the values and norms of leadership in the organization, so that they can quickly settle into their new position. To create a smooth transition, it can help if the organization offers insight into the expectations placed on managers in general.

#### (Compliance) Operational management

quick mastery of day-to-day operations is one of the factors that can create the best cross-boarding experience for a manager. Here, the organization can prepare practical support that makes it easy for the manager to slip into operations and quickly understand the routines in the department. For example, this can be with the help of process overviews, important documentation or support from an operations manager.

#### (Network) Organizational management

A manager's network often consists of the other managers, and colleagues at management level can be some of the most important sparring partners in both the offboarding and onboarding process. Becoming part of the management team, if the established leaders are prepared and willing to accept you, can provide invaluable support and help the new leader find his or her place in the organizational network. A conscious effort to include new managers in the management team can be crucial for collaboration.

#### (Collaboration) Employee management

A key part of the manager's role is to build a strong relationship with their new team. The faster and easier the leader gets to know his new team, the better they get off to a good start. A thorough introduction to team members' skills, tasks, goals, and interests can support an early understanding of how the team works best

together. As a leader, it will be easier to gain the trust of the team and establish clear guidelines for collaboration if you prioritize this process.

**(Competences) Professional management**

It can be crucial for the manager's success to be quickly updated on the professional expertise in the department. Understanding the department's specific professionalism makes it easier to create a relevant competence development strategy and can be crucial to winning the employees' respect as a leader. The organization can help by offering insight into the department's projects, professional goals and strategic focus areas.

**(Results) Strategic management**

The clearer the strategic goals and success criteria are clear to the manager, the easier it will be to navigate the new role and create results. When the leader has access to clear goals, expectations and success criteria from the start, they can quickly focus on creating strategic progress and visible results. It can therefore be an advantage if the organization communicates the long-term strategies and plans for the department the manager joins.

By supporting the six dimensions of the Cross-boarding process, the organization – also for the managers – can create a successful transition for managers that both gives them the necessary overview and helps them to create value and coherence from day one in the new role.

## **Leading through Cross-boarding: Safety in the unsafe**

One of the biggest challenges for a leader is leading people through periods of uncertainty where they may not be able to offer clear answers or predictability. Cross-boarding is one of those changes.

It is important to remember that even if a change takes place 'on the outside', and one's desk is in practice moved somewhere else, the internal, psychological process is not necessarily synchronized with the outer. Some emotions and realizations simply take longer than the practical ones. (Sometimes they even go faster, so the employee may actually get impatient). In Cross-boarding, the employee may find themselves in a transition where the person has not yet completely let go of their previous role, but also does not feel fully anchored in the new one. This in-between period can be characterized by uncertainty and ambivalence, and the employee may experience a feeling of insecurity in relation to the new.

The manager's task here is to help the employee navigate this precarious state. Instead of providing security that may not be possible, you as a manager can focus on creating psychological safety by acknowledging the employee's uncertainty and leaving room for questions and reflection. By generally offering and facilitating conversations where the employee can share their concerns and get support, a sense of security is created in feeling insecure – an understanding that uncertainty is a natural part of the process. The goal is thus to create an environment where the employee does not have to 'hold' all the responsibility themselves, but instead can feel safe in the fact that they gradually find their place and meaning in the new role.

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