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Session: #38020

Commanding the Transition - Influence from Day One: Navigating Credit Leadership in a New Organization

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Years in current role

How many years have you been in your current role?

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Icebreaker activity

What was the greatest challenge you faced when leading a department in a new organization?

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Agenda

- Introduction: Why Leading in a New Organization is Challenging
- The First 90 Days: Key Focus Areas
- Understanding the New Organizational Culture
- Building Relationships & Trust
- Setting Expectations and Clear Communication
- Aligning with Organizational Goals
- Leading through Change and Overcoming Resistance
- Effective Decision-Making in New Environments
- Q&A and Discussion

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Introduction

Why Leadership in a New Organization is Challenging

- Unfamiliarity with culture, systems, and people
- Establishing authority and trust quickly
- Adapting to the organization's strategic goals
- Navigating the legacy of past leadership
- *Question: Which of these 4 is the most challenging and why?*

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The First 90 Days: Key Focus Areas

What to Prioritize in the Initial Period

- Assessing the team and understanding existing processes
- Understanding company culture and leadership expectations
- Reviewing current credit policies and systems
- Engaging with key stakeholders (e.g., Sales, Finance, Risk)
- Setting short-term and long-term goals

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Activity To Help Assess Team

- What would you want to know about your new leader? Ask me anything.
- What would you want to keep the same?
- What would you want to change?
- How would you describe the current culture of your team?

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The Importance of Culture

- **Organizational Culture Overview**
 - What is organizational culture?
 - How culture impacts leadership and decision-making
 - Importance of understanding and adapting to the existing culture
- **Questions to Consider**
 - What are the unspoken rules here?
 - How can you align your leadership style with this culture?

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Building Relationships & Trust

- **Key Actions for Building Trust**
 - Be visible and accessible
 - Show authenticity and transparency
 - Listen actively to team members
 - Develop credibility through consistent actions
- **Case Study/Example**
 - A real-life example of a leader who built trust in a new organization

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Understanding Team Dynamics

Building Trust and Rapport

- ▶ Get to know each team member's strengths and challenges
- ▶ Regular one-on-one meetings
- ▶ Establishing clear expectations and accountability
- ▶ Cultivating a collaborative environment

Question - What other things have you done to build trust and rapport?

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Common Pitfalls to Avoid

- **Pitfalls in Leading in a New Organization**
 - Failing to listen and understand the culture
 - Making decisions in isolation without input from the team
 - Overwhelming the team with too many changes too quickly
 - **How to Avoid These Pitfalls**
 - Take time to understand the organizational landscape
 - Seek feedback before implementing large changes
- Question – what was the biggest pitfall you encountered?**

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Setting Expectations & Clear Communication

- **Communicating Your Leadership Vision**
 - Share your short-term and long-term goals with the team
 - Be clear about your expectations and encourage feedback
 - **Key Principles for Effective Communication**
 - Be consistent and clear in your messages
 - Set up regular check-ins and feedback sessions
 - **Establishing a Feedback Loop**
 - Creating an open environment where feedback is encouraged
- Question – What have you done to successfully encourage feedback? – One on one meetings**

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Aligning with Organizational Goals

- **Understanding the Organization's Strategic Goals**
 - How your leadership aligns with the overall mission
 - Ensuring your team understands the broader objectives
- **Effective Goal Setting and Alignment**
 - Break down large goals into actionable steps
 - Use key performance indicators (KPIs) for tracking progress

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Credit Policy: Review & Implementation

- **Assessing Existing Credit Policies**
 - How to evaluate the current credit policy framework
 - Identifying gaps or areas for improvement
 - Communicating and enforcing policy changes
 - Ensuring compliance with company goals and regulations

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Leading through Change and Overcoming Resistance

- **Leading Change Effectively**
 - Assessing the current state and identifying areas for improvement
 - Introducing changes in a way that minimizes resistance
- **Techniques for Managing Resistance**
 - Active listening and addressing concerns
 - Gaining buy-in through involvement and communication

Question - What are some creative ways you've found to motivate your team during challenging periods

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The Role of Emotional Intelligence

- **Emotional Intelligence (EQ) in Leadership**
 - Recognizing and managing your own emotions
 - Understanding and influencing the emotions of others
- **How EQ Improves Leadership**
 - Building relationships and fostering collaboration
 - Managing conflicts and stress in the workplace

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Decision-Making in New Environments

- **Key Approaches to Effective Decision-Making**
 - Gather relevant data and context before making decisions
 - Empower team members and involve them in the process
 - Be adaptable, especially in uncertain situations
- **Balancing Speed with Thoughtfulness**
 - How to make decisions quickly while ensuring thorough analysis

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Key Leadership Traits for Success

- **Top Leadership Traits for Leading in a New Organization**
 - Adaptability and resilience
 - Emotional intelligence and empathy
 - Visionary thinking and clarity
 - Decisiveness and confidence
- **Examples of Successful Leaders**
 - Brief stories or quotes from leaders who excelled in new organizations

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Building Your Personal Leadership Strategy

- **Creating Your Own Leadership Strategy**
 - Assess your leadership style and areas for growth
 - Set goals and milestones for your leadership journey in this new role
 - Continuously seek feedback and adjust your approach
- **Action Plan**
 - Develop a 30-day, 60-day, and 90-day leadership plan

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Strategies for Long-Term Success

Fostering Growth and Stability

- Continuing education and professional development
- Leveraging mentorship and networking
- Creating an adaptive and resilient team
- Continuously evaluating and refining credit management strategies

Audience Share Moment – Share a story about a great mentor and how they helped you in a new leadership role.

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Conclusion

- **Key Takeaways**
 - Leading in a new organization requires adaptability, patience, and relationship-building
 - Success depends on understanding the culture, clear communication, and aligning with organizational goals
- **Final Thought**
 - Leadership is a journey—take the time to learn, listen, and grow alongside your team

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Q&A and Discussion

- Please share any lessons you have learned from your career

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Thank You

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Commanding the Transition—Influence from Day One: Navigating Credit Leadership in a New Organization

Taking on a new leadership role in the credit department presents both opportunities and challenges. This session focuses on the critical aspects of leading a credit function from day one—establishing effective credit policies, understanding team dynamics, aligning with organizational goals, strengthening communication with sales and finance partners, and leveraging data to support sound credit decisions. Attendees will gain practical tools and proven strategies to drive results, manage risk, and position their credit departments for long-term success.

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