

leader6

ASCEND DISCOVERY PROGRAM

First Meeting Guide with My Immediate Superior

This guide is an essential tool to prepare, conduct, and make the most of your first formal meeting with your hierarchical superior following your promotion. This conversation represents a crucial step in your transition to your new responsibilities, to align your mutual expectations and establish the foundation for a productive professional relationship.

Tips to make the most of this meeting

Before the meeting

- Arrive prepared with your questions and preliminary thoughts.
- Adopt an active and open listening posture.
- Use a method to take notes effectively.

During the meeting

- Be able to express your enthusiasm for your new role.
- Listen carefully and rephrase to ensure you understand well.
- Look for concrete examples to illustrate abstract expectations.

After the meeting

- Send a thank you email summarizing the key points discussed.
- Integrate the clarified expectations into your 30-60-90 day plan.
- Refer to this document regularly to evaluate your progress.

This guide is a living document that evolves over time as you progress in your leadership role. Review it regularly to ensure you remain aligned with your superior's expectations and to measure your professional development.

BEFORE THE MEETING: PREPARATION

Basic Information

Date of meeting	Duration	Location/format (in-person / virtual / name of the room)
Name of the person I'm meeting with	Title	

My three objectives for this meeting

These objectives should be SMART+.

1

2

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Short and medium-term vision of success

What are my expectations regarding my new role?

How do I personally define success in this position?

Clarification of expectations

What are the priority responsibilities of my position according to my current understanding?

What concrete results should I produce in the coming months?

Role transition

What aspects of my technical expertise should I continue to leverage?

What new skills should I develop as a priority?

DURING THE MEETING: DISCUSSION GUIDE

30-60-90 Day Plan

What are your five priority expectations for my first 30 days?

What objectives should I achieve within 60 days?

What concrete results do you expect after 90 days?

Success Criteria

On what specific criteria will you evaluate my success in this new role?

How will you measure the effectiveness of my leadership?

What is the difference between a "satisfactory" leader and an "exceptional" leader from your perspective?

DURING THE MEETING: DISCUSSION GUIDE

Pitfalls and challenges

What are the pitfalls to avoid that you have observed in other new leaders?

What particular challenges do you anticipate for me during this transition?

Are there any tensions or sensitive situations that I should be aware of?

Management and communication style

What is your preference regarding frequency and format of communication?

How do you prefer to be informed of problems or challenges encountered?

What topics would you like to be systematically consulted on?

DURING THE MEETING: DISCUSSION GUIDE

Other meeting notes

AFTER THE MEETING: SUMMARY AND ACTION PLAN

Mutual Commitments

What I have committed to do

What my superior has committed to do

Next concrete steps

Actions to take within 48 hours

Actions to take within the week

Actions to take within the month

Follow-up calendar

Date of next formal meeting

Frequency of agreed regular check-ins

REVIEW AFTER 30 DAYS

Review date

Progress made relative to initial expectations

Necessary adjustments

REVIEW AFTER 60 DAYS

Review date

Progress made relative to initial expectations

Necessary adjustments

REVIEW AFTER 90 DAYS

Review date

Progress made relative to initial expectations

Necessary adjustments