Sample Report: New Leader Listening

100 Signal Event conversations · 95 of 108 completed (88%) · Updated Oct 23, 2026 · Closed

THE INTELLIGENCE GAP

Sample data: **New Leader Listening captures what a newly arrived leader needs to hear from everyone in their organization: what people value and would want protected, the challenges facing the group and why they exist, and what they need from the leader, including the questions they most want answered.**

A leader who has just taken over an organization of fifty or more people has to make an early set of commitments (what to protect, what to fix, where to start, who to rely on) and has to make them on a reading of the organization assembled in a few weeks. At the same time, the organization is forming its own reading of the leader.

Existing approaches fall short:

- **One-to-one listening conversations** do not scale to a whole organization in any useful window, and the method biases its own result: the leader is swayed by whoever is most forceful or articulate, which is Watkins's own stated objection to how the practice is usually run.
- **New Leader Assimilation**, the structured professional version of that practice, fixes the question set but not the delivery. It needs a scheduled facilitator; it runs at direct-team scale in a single room; candor is bounded by who else is present and by a human summarizing afterward; and the sessions sit two to six weeks out, with follow-up at six months. It is also the only established practice that asks people what they expect of and worry about in the new leader, and it asks only the immediate team.
- **Engagement surveys** score categories chosen before the leader arrived, and which categories matter is exactly what the leader is trying to find out. They also strip out the reasoning that makes a finding actionable.
- **Skip-level meetings** sample a self-selecting group, systematically missing the people least likely to volunteer.
- **Cascaded summaries** arrive stripped of the passages that produced them, two layers of interpretation after the fact.

SUMMARY

THE HEADLINE

People value the freedom to make customer calls and the colleagues who rush in to help. Two ticketing tools, unfinished handoffs and decisions left open in the transition are what get in the way.

The most widely shared themes are about what people are proud of: making customer calls, like credits, without waiting for approval, and colleagues from other teams jumping into #red-accounts unasked. The most common challenges are running Desk and Relay side by side, setups arriving unfinished after go-live, and decisions left open since the leadership transition. People want those decisions made and held, and want the speed and backing they credit for recent wins kept.

KEY DIMENSIONS

What we set out to learn.

Pride and what to protect

We heard from all 100 on this

The top 3 themes indicate staff extended timelines, issued credits and worked weekends without approval to save accounts. Colleagues from other teams joined urgent channels unasked and stayed until problems were resolved. Gary ratified staff calls after the fact and absorbed executive pressure so reps could keep working.

THEMES · 7

Staff could make customer calls like credits without waiting for approval 44 of 100 participants

Participants told stories of extending timelines, issuing credits, and coming in on weekends on their own call, and described specific customer saves.

Frontline discretion is doing real retention work here. If approval rules tighten, the saves participants described may stop happening, and renewals could follow.

> "A couple years back I spent an extra week with a small electrical outfit in Boise because their owner was scrambling with a sick office manager. Nobody made me justify it or fill out forms, I just did it. They've grown from four trucks to twelve since then."
>
> PARTICIPANT 89

> "Probably what happened back in March with an electrical customer. They lost their invoice sync on a Friday afternoon, 28 trucks, and I came in Saturday to rebuild the mapping so they could run payroll on time."
>
> PARTICIPANT 94

> "In January we had a customer about to cancel after a billing run double-charged their customers. I called the owner myself that night, refunded the affected invoices, and kept the account."
>
> PARTICIPANT 74

People from other teams jumped into #red-accounts unasked to help 43 of 100 participants

Colleagues from other teams described joining #red-accounts within the hour, often after hours, and stayed until the account was unstuck.

Rescue of stuck accounts rides on voluntary cross-team help, not process. If those people move or the channel quiets, the safety net thins.

> "Last spring a plumbing customer requested me specifically for their 40-truck rollout, and when their territory split failed to build, someone from Customer Operations stayed with me in #red-accounts until two in the afternoon until we fixed it."
>
> PARTICIPANT 25

> "In my fifth week I posted a stuck customer in #red-accounts and three people from other teams were in there within the hour, just helping without being asked."
>
> PARTICIPANT 49

> "Someone from Account Support jumped into #red-accounts at 7 pm one night with a route template fix for one of my customers—totally unprompted, just saw the problem and solved it."
>
> PARTICIPANT 90

COUNTERPOINTS · 6 PARTICIPANTS

> "Right now it's the same four of us getting pinged every time there's a red account, and that's not sustainable."
>
> PARTICIPANT 19
>
> Says the same few people carry the rescues.

> "I worry that the big accounts, like Halvorsen, can soak up all the oxygen in that channel."
>
> PARTICIPANT 86
>
> Sees the swarming as lopsided toward the biggest accounts.

> "In September we had a 40-truck HVAC customer wait eight days for a config review while the team was pulled to Halvorsen."
>
> PARTICIPANT 87
>
> A smaller customer waited while the team swarmed one account.

> "I'm spending half my week jumping into threads for accounts that aren't even mine, so my own check-in calls keep slipping."
>
> PARTICIPANT 23
>
> Helping on other accounts costs their own customers.

> "It's when something urgent hits #red-accounts and I'm already mid-conversation with a renewal customer who needs attention"
>
> PARTICIPANT 47
>
> The channel pulls them away from their own customer work.

> "It's when I'm mid-week on a new implementation, making real progress, and then #red-accounts lights up with something urgent from a customer who went live months ago."
>
> PARTICIPANT 51
>
> The channel interrupts planned implementation work.

Gary backed staff decisions and cleared obstacles when they needed help 20 of 100 participants

Gary ratified staff calls after the fact and absorbed exec pressure so reps could keep helping customers.

Participants are used to acting first and getting cover afterward. If that pattern changes, their speed with customers likely slows while they wait for approval.

> "Gary really had our backs during the Halvorsen go-live in the spring. It was a rough week, and after a bad Thursday he sent us a note saying "I've got this one, keep working" and took all the heat in the exec meeting. That let us finish two other customers that same week."

PARTICIPANT 87

> "Last year I told Gary I'd offered a pest-control customer in Tulsa a free week of onsite help, and I was braced for pushback. He just said "you know that customer better than I do.""

PARTICIPANT 32

> "He hired people who'd been around and then got out of the way. If you weren't screwing up or the customer wasn't screaming, he assumed you knew what you were doing."

PARTICIPANT 89

Self-started tools and fixes, like AI summaries, spread across teams 16 of 100 participants

Participants built their own checklists, saved searches, and AI prompts to solve their own problems, and colleagues picked them up by asking, not through any formal rollout.

Useful tools travel through personal asks, not formal channels, so gains depend on who knows whom and may vanish when those people move on.

> "I built this three-minute saved view that flags renewals with open tickets, and someone from Customer Ops actually started using it the next week."

PARTICIPANT 56

> "Back in August, I presented a saved-reply filter at a Friday demo that cut our first-response time on billing questions from about four hours to under one—that felt good, and someone from Implementation even asked for the filter rules afterwards."

PARTICIPANT 10

> "I figured it out on my own, but a couple of colleagues have started asking me for my prompt."

PARTICIPANT 19

Blameless write-ups helped teams learn from incidents without fear 15 of 100 participants

Each honest write-up ended with a named fix the next person reused: a checklist line, a validation script, a dry-run step, a confirmation prompt.

Blameless write-ups are load-bearing here: people learn from them and reuse the fixes. Their value depends on candor holding up after incidents.

> "Back in June, I helped a colleague with a write-up on a customer's failed overnight import — I did the timeline part. What struck me was that nobody got blamed, everyone actually read it, and it changed how I did my next two cutovers by adding a dry-run step."

PARTICIPANT 68

> "After that import loop a couple years back, we did a write-up that led to an import-validation script. It's caught bad service-zone files before they load probably a dozen times since then — saved entire weekends."

PARTICIPANT 88

> "in my third month I accidentally triggered a mass email blast to a customer's entire technician list—like, their whole list—and I was mortified. But a colleague walked me through the write-up afterwards, and it didn't point at me at all, just identified the missing confirmation step in the process."

PARTICIPANT 20

Gary's open Friday office hours made the leader easy to reach 7 of 100 participants

Participants dropped in on Fridays with stuck deals and left with a decision, with Gary already knowing them and their accounts.

For the people who used them, the Friday office hours were a quick route to unblock stuck accounts; no equivalent channel exists yet.

> "I dropped in with this messy landscaping customer situation, and Gary knew my name, remembered my kid's soccer season, and cleared my blocker in ten minutes."

PARTICIPANT 46

> "I remember walking in one Friday around four with this nightmare multi-branch import for a 60-truck HVAC chain, completely stuck. Gary pulled up a chair, asked maybe three questions, and told me to call the owner myself and promise a date."

PARTICIPANT 67

> "Gary making time for you, remembering what you were dealing with, that came from him actually caring."

PARTICIPANT 38

The FieldLoop checklist's checkpoints caught problems before go-live 7 of 100 participants

Timed day-10, day-12 and day-21 checkpoints surfaced mis-mapped zones, unloaded price books and missing skill mappings while there was still time to fix them and still go live around day 30.

On-time, clean go-lives rest on these checkpoints holding. If the cadence slips, defects like unloaded price books surface after launch instead of before.

> "Last winter I took a 22-truck electrical customer live in 28 days using it — the day-12 data sign-off and day-21 dispatcher dry run worked exactly as designed. They didn't open a single ticket the first week."

PARTICIPANT 24

> "when we spotted mis-mapped service zones for a pest customer before go-live. They went live in 29 days back in March and haven't had a single reopen since."

PARTICIPANT 36

> "we caught a customer whose price book hadn't loaded at all, a 20-truck HVAC operation. If we'd missed it until later, we'd have lost a week or more, but catching it on day ten meant we still went live on day 29."

PARTICIPANT 22

Challenges and causes

96 of 100 participants raised this

The top 3 themes indicate that running Desk and Relay together created daily extra work. Customers arrived with setups unfinished; support staff rebuilt invoice templates, tax rates, dispatch rules and technician roles after go-live. Open decisions after the leadership transition left people in limbo.

THEMES · TOP 10 OF 14

Running both Desk and Relay with two playbooks created daily extra work 35 of 100 participants

Participants opened both systems before every renewal or cutover, and when they missed something customers received two different checklists or handovers stalled for days.

Running two systems adds rework to handovers and renewal prep, and reaches customers as conflicting checklists and delayed handovers.

> "Last month I had notes in Desk on a pest-control customer, my colleague had hers in Relay, and the customer got two different go-live checklists."

PARTICIPANT 46

> "Last month a handover to support took three days because the notes didn't carry across"

PARTICIPANT 73

> "Before every cutover, I have to check both Relay and Desk for customer history because some accounts are in one and some in the other. It adds maybe half an hour per customer"

PARTICIPANT 27

Customers arrived from Implementation with setups still unfinished 29 of 100 participants

Support staff rebuilt invoice templates, tax rates, dispatch rules and technician roles weeks after go-live, often across multiple tickets per customer.

Support capacity is being spent finishing Implementation's work weeks after go-live, and new customers meet the product in an unfinished state.

> "last month, a pest control customer in Tucson went live with blank invoice templates, and I got pulled in weeks later to fix it."
>
> PARTICIPANT 77

> "I had one where the technician skill tags were completely empty, so dispatch wasn't working"
>
> PARTICIPANT 45

> "One pest control firm had no recurring-service templates, and I spent nine tickets over three weeks building them."
>
> PARTICIPANT 78

Key decisions were left open since the leadership transition, leaving people in limbo 27 of 100 participants

Participants said the waiting itself, not the eventual answer, was what drained them and stalled their planning.

The cost participants carry is the open loop itself, so continued silence on tool, playbook, ownership and headcount keeps planning stalled regardless of eventual answers.

> "I don't really care which tool wins, honestly. What costs us isn't the wrong choice, it's the not-choosing."
>
> PARTICIPANT 37

> "what hurts isn't the answer, it's the limbo"
>
> PARTICIPANT 37

> "it's more about her addressing it directly. People can handle whatever the decision is, but the uncertainty is what's draining."
>
> PARTICIPANT 87

Escalation follow-ups consumed much of people's weeks and displaced planned work 21 of 100 participants

Participants said red-account pings pulled them mid-task, so renewal calls, health checks and check-ins slid by days or weeks.

Escalation coordination is quietly displacing renewal prep and check-ins, so revenue-protecting work slips and some customers already feel forgotten by their account team.

> "I'm spending half my week jumping into threads for accounts that aren't even mine, so my own check-in calls keep slipping. Two customers last month literally asked if I'd forgotten about them, which felt terrible."
>
> PARTICIPANT 23

> "The account manager owns the thread in #red-accounts, but then you've got Support jumping in, sometimes Implementation if it's a config issue, and you're coordinating across teams. My renewal calls get pushed, follow-ups slide. It can take days to close one out, and meanwhile the other work just piles up."
>
> PARTICIPANT 60

> "Renewal health checks get delayed sometimes, and I'm slower responding to account questions than I'd"
>
> PARTICIPANT 54

Six frozen roles left teams stretched and carrying more accounts 21 of 100 participants

With six roles frozen since spring, participants said their books grew while headcount did not, so each person absorbed the gap.

Coverage is thinning as books grow: participants said accounts go without proper check-ins and go-lives share engineers, so quality may slip while roles stay frozen.

> "I'm carrying nine active customers now when it used to be six"
>
> PARTICIPANT 62

> "We've had six positions frozen since spring, and right now two of my go-lives are sharing one engineer."

> PARTICIPANT 24

> "My book is up about a third since spring because those frozen roles haven't come back, so I'm carrying more accounts than I can actually check in on properly."
> PARTICIPANT 57

Participants guessed that rushed go-lives caused setups to arrive unfinished 19 of 100 participants

Participants hedged when naming the 45-day target as the cause, offering it as one guess among several rather than something they had seen directly.

The real cause of unfinished setups is not visible from inside the organization. The 45-day target is one hypothesis among several, not a confirmed driver.

> "My best guess? We're rushing go-lives to hit timelines, and stuff that should get caught in implementation is slipping through."
> PARTICIPANT 51

> "Maybe Implementation is rushing to hit the CEO's forty-five-day target? Or maybe there are steps in the go-live process that aren't clear between the old Pellwood playbook and the FieldLoop one."
> PARTICIPANT 58

> "Could be Implementation is rushing to hit the CEO's forty-five-day target, or maybe the go-live checklist isn't clear enough between the FieldLoop and Pellwood playbooks."
> PARTICIPANT 48

Halvorsen escalations tied up individuals and teams for months 17 of 100 participants

Halvorsen work pushed other customers' tickets to the back of the queue, with smaller accounts waiting a week or more.

One account is reshaping service for the rest. Smaller customers waiting over a week may lose trust while the pattern holds.

> "In September we had a 40-truck HVAC customer wait eight days for a config review while the team was pulled to Halvorsen."
> PARTICIPANT 87

> "Over the summer when everyone swarmed on Halvorsen, I saw a 25-truck pest company wait nine days for a data-import fix."
> PARTICIPANT 86

> "Since spring, Halvorsen-related escalations have taken most of our pod's evenings and mornings, so my own queue often sits untouched until midday."
> PARTICIPANT 10

Nobody clearly owned customers after go-live, so issues bounced between teams 15 of 100 participants

With no named owner post go-live, accounts defaulted to whoever picked up the phone or sat in #red-accounts until someone did

Customers wait days while Implementation and Customer Ops each assume the other is handling it, and renewal work gets displaced by whoever absorbs the issue.

> "last month, 25-truck electrical customer, my team and Customer Ops both assumed the other was handling routing rules follow-up. It sat for nine days before anyone caught it."
> PARTICIPANT 42

> "Implementation declares a customer "done," but if issues pop up in the first few weeks—and they almost always do—nobody's clearly on point. So the customer emails whoever they know, it lands in #red-accounts, and someone like me picks it up even though I've got renewals coming due that actually need attention."
> PARTICIPANT 66

> "it's still not totally clear who owns a customer after go-live — Implementation or us — so stuff just bounces around while we wait for someone to decide."
>
> PARTICIPANT 69

Staff could not tell which work counted toward promotion 13 of 100 participants

Participants pointed to concrete projects they had already finished, cross-team cleanups, playbook rollouts, after-hours coverage, tough escalations, and said no one told them whether any of it moved them toward promotion.

If capable people keep taking hard work without any read on advancement, some will stop volunteering or leave, and the organization loses its most engaged contributors.

> "I ran the playbook rollout for a quarter, which felt like a meaningful project, but nobody could tell me whether that type of work actually moves me toward a senior title."
>
> PARTICIPANT 36

> "I've been at the senior level for five years now, taking on the customer calls nobody else wanted, and I honestly can't tell what the next step is or whether that work even counts toward it."
>
> PARTICIPANT 4

> "I've had a good first year — the AI tool, my team's performing well — but I honestly can't tell which of my projects actually count toward advancement."
>
> PARTICIPANT 9

COUNTERPOINTS · 3 PARTICIPANTS

Quotes need 5 participants.

The 45-day go-live target looked unworkable with current staff and capacity 12 of 100 participants

Participants said halving go-live to 45 days with six roles frozen would push half-configured customers and skipped documentation downstream to them.

The 45-day target is already generating predicted support-queue overflow and documentation gaps that will surface months later as unreconstructable custom configs.

> "If the forty-five-day go-live push means half-configured customers landing in our queue at end-of-shift, that'll break."
>
> PARTICIPANT 3

> "I think it's the CEO wanting to cut time-to-live to forty-five days while we've got six roles frozen. That's a pretty tight squeeze — we're already stretched, and I'm not sure how we speed up without either more people or a really streamlined process that everyone actually follows."
>
> PARTICIPANT 36

> "The CEO wants us down to forty-five days from ninety, which is ambitious. My worry is that we'll cut corners on documentation to hit the timeline, and then six months later we're all scrambling to figure out how someone's custom setup works."
>
> PARTICIPANT 33

4 more themes are in the online report.

Hopes and needs

98 of 100 participants raised this

The top 3 themes indicate staff want the target tested against real customers, scoped or resourced to fit, and shielded by managers. They want the leader to commit to decisions and not reverse them. They want to keep making customer calls without new approvals.

THEMES · TOP 10 OF 14

Staff asked for the 45-day target to be made realistic and tested 20 of 100 participants

Staff attached conditions to the 45-day target: test it against real customers, cut scope or add resources to fit it, and have managers shield the team when it bites.

Participants treat the 45-day target as conditional, so pushing it without naming trade-offs or manager cover risks early loss of credibility with staff.

> "Set a realistic target for forty-five days, or push back if it's not feasible."
>
> PARTICIPANT 3

> "Make sure that 45-day target is actually realistic, and give people some protection from it."
>
> PARTICIPANT 79

> "If it's real, I need to know what we're cutting or changing to make it happen, because the current process doesn't fit in 45 days without breaking something."
>
> PARTICIPANT 72

Staff asked the new leader to make open decisions and stick to them 20 of 100 participants

Staff said either answer would do, as long as the leader committed and did not flip the call a month later.

Reversing an early call on ownership or the 45-day timeline will cost more than picking an imperfect option, since teams need stability to lead against.

> "Honestly, either answer helps if it's definitive."
>
> PARTICIPANT 81

> "I don't need a leader who gets everything perfect, I need one who decides things and sticks with them long enough for us to make them work."
>
> PARTICIPANT 37

> "I can work with almost any decision if I know it's actually decided and not going to flip on me next month."
>
> PARTICIPANT 46

Staff asked the new leader to keep judgment calls free of new approvals 17 of 100 participants

Staff asked the new leader to leave their in-the-moment customer calls, like waiving a fee or adjusting a timeline, free of sign-offs so they can act before the moment passes

Adding approvals in front of these in-the-moment calls would slow customer response and read as distrust, costing early goodwill with staff.

> "Let my people waive a fee if it's the right call, or stay late to fix a customer's weekend schedule without needing permission every time."
>
> PARTICIPANT 53

> "I need to be able to make the call in the moment — whether that's hopping on a call, adjusting a setup, whatever it takes to get them unstuck."
>
> PARTICIPANT 62

> "I don't want to suddenly need three approvals to give someone an extra training session or adjust a timeline."
>
> PARTICIPANT 90

Staff asked the new leader to decide post-go-live ownership and hold to it 15 of 100 participants

Staff told the new leader they did not care which team owned customers after go-live, as long as the line was written down and held to.

Participants framed this as an early ask of the new leader where either answer works; what blocks planning is the decision staying open.

> “I don't even care that much which way she goes — does Implementation stay on for two weeks post-launch, or does Customer Ops take it day one? Either works. I just need to be able to tell my team clearly what we're responsible for”
>
> PARTICIPANT 42

> “decide whether post-go-live support stays with Implementation for a certain period or goes straight to Customer Operations, document it, and then actually hold to that so people know what to expect.”
>
> PARTICIPANT 59

> “Honestly, I'd settle for any clear decision on who owns a customer after go-live — Implementation or Customer Ops.”
>
> PARTICIPANT 69

Staff asked leadership to pick one ticketing tool and commit to it 13 of 100 participants

Staff said they were holding off on investing in either tool until leadership named one and committed to a migration timeline.

Staff are waiting on a named decision between Relay and Desk. Until leadership picks one and holds it, daily work and skill-building stay on hold.

> “which ticketing tool are we keeping, Relay or Desk? That touches everything we do daily and it's been hanging for over a year now.”
>
> PARTICIPANT 63

> “Just pick one and commit to it, honestly.”
>
> PARTICIPANT 46

> “I don't want to invest time mastering one if it's going away. I just want to know where to focus.”
>
> PARTICIPANT 34

Staff asked for clear priorities when urgent requests conflicted 12 of 100 participants

Staff wanted a named person to call which request wins and to shield planned work from the rest.

Staff are asking the new leader to arbitrate when sales, escalations, and go-lives collide. Without that call, planned work keeps losing to whoever interrupts first.

> “when we're getting pulled in three directions, I need someone who can say "this one first, that one waits.""
>
> PARTICIPANT 21

> “I guess just knowing what the priorities are when things conflict—like when Sales needs something versus planned go-lives.”
>
> PARTICIPANT 43

> “I'd want her to help us understand when something should jump the line versus when it queues.”
>
> PARTICIPANT 72

Staff asked the new leader to back their calls the way Gary did 11 of 100 participants

Staff asked the new leader to trust their customer calls upfront and defend those calls afterward, not second-guess them line by line.

Participants who raised this want frontline customer calls backed after the fact, the way Gary did.

> “I'd want her to protect that feeling that when you make a judgment call for a customer, you won't get second-guessed to death.”
>
> PARTICIPANT 91

> “I need her to back me when I make a call, the way Gary did, even if it's not by-the-book”
>
> PARTICIPANT 29

> “when something's my call to make, tell me that clearly and then back me up like Gary did”
>
> PARTICIPANT 47

Staff asked the new leader to be reachable, including at Lisbon hours 11 of 100 participants

Staff asked for a standing slot they could count on, at an hour Lisbon could actually attend, so cross-team issues would not wait weeks

Without a dependable slot at a Lisbon-friendly hour, cross-team questions keep waiting weeks or arriving as fires, which is what participants flagged.

> "Being able to put something in front of them quickly when it's time-sensitive, not waiting for the next one-on-one three weeks out."
>
> PARTICIPANT 97

> "A regular open session where people can actually show up and talk, not just times that work for Denver."
>
> PARTICIPANT 75

> "Be visible and reachable, with some meetings at hours Lisbon can actually join."
>
> PARTICIPANT 18

COUNTERPOINTS · 4 PARTICIPANTS

Quotes need 5 participants.

Staff asked the new leader to push back on Sales date promises 11 of 100 participants

Staff wanted the new leader to either confront Sales directly or install a gate requiring Implementation sign-off before dates reach customers.

Participants who raised this see Sales date promises as an ongoing pattern that lands on Delivery, and are watching whether it changes.

> "I'd want to hear that she's willing to have the hard conversation with the Sales VP, or that there's going to be a clear process where Implementation signs off on dates before they go to customers."
>
> PARTICIPANT 67

> "I don't need her to fight every battle, but I need to know she won't just let unrealistic promises roll downhill to us and then expect us to absorb the damage"
>
> PARTICIPANT 29

> "will there be a formal handoff where Implementation confirms dates before Sales quotes them?"
>
> PARTICIPANT 55

Staff asked for a shared definition of done and a handoff checklist 10 of 100 participants

Staff wanted both teams to agree upfront, in writing, on what 'done' looks like and to sign off before a customer moved over.

The people who raised this point to the same fix, a shared definition of done signed by both teams, which may mean slower go-lives.

> "Define what "done" looks like at handover — something both teams agree to upfront."
>
> PARTICIPANT 9

> "Either slow down go-lives until setup's actually done, or give us a real handoff checklist that both sides sign off on."
>
> PARTICIPANT 78

> "Maybe a clear handoff checklist or criteria that says "these things must be done before Account Support takes over," and then a defined escalation path if something's missing."
>
> PARTICIPANT 49

4 more themes are in the online report.

Questions for the leader

88 of 100 participants raised this

The top 3 themes indicate staff want a straight answer on frozen roles to plan capacity and scope. Staff said the new leader's first priorities, and what they keep, would show how well they understand the work. Staff are unsure whether the go-live target is firm or flexible.

THEMES · 4

Staff asked for a straight answer on whether frozen roles would return 21 of 100 participants

Participants said a clear no would help as much as a yes, because either answer let them plan capacity and scope.

Silence on the frozen roles has a cost: without a definite answer, teams cannot plan capacity or reset scope, so delivery commitments stay unrealistic.

> "If it's "yes, they reopen in Q1," great, we can hold on and plan the ramp. If it's "no, they're not coming back," then we need to reset expectations on what we can deliver with the team we have."
>
> PARTICIPANT 21

> "Either one helps, honestly. Yes means we can plan for more capacity. No means we adjust scope or timelines."
>
> PARTICIPANT 24

> "I'd take a clear no over vague hope."
>
> PARTICIPANT 1

Staff wanted to know what the new leader would change or keep first 21 of 100 participants

Staff treated the new leader's first priorities as a tell for whether they understood the actual work.

Several participants said the first priorities named will show them how well the operational work is understood.

> "does she go after the flashy CEO thing like the forty-five day timeline, or does she fix the boring operational stuff that's actually breaking? That tells me if she gets what we're dealing with day-to-day."
>
> PARTICIPANT 42

> "I just want to know what she thinks matters most, because that tells me where things are actually going to move."
>
> PARTICIPANT 17

> "If she named something specific — like the blameless write-ups or how we handle escalations — that would tell me she's done her homework and understands what's working."
>
> PARTICIPANT 65

Staff asked whether the 45-day time-to-live target was real 14 of 100 participants

Staff asked whether the 45-day go-live target was a firm mandate or an aspirational number that might move.

Staff are waiting on an early signal about whether the 45-day target holds, and in the meantime teams are planning against different versions of it.

> "The CEO wants time-to-live cut from ninety days to forty-five, but I don't know if that's an actual mandate or an aspirational goal."
>
> PARTICIPANT 9

> "Is the forty-five-day target real? Like, is that actually happening, or is it something we can push back on if the data shows it's not working?"
>
> PARTICIPANT 51

> "is the 45-day target real, or is it a stretch goal?"
>
> PARTICIPANT 52

Remote pod members worried their team might be cut or restructured 12 of 100 participants

Participants read the hiring freeze and new leadership as signals Lisbon could be first on the chopping block, and they wanted a direct answer either way.

Silence on the Lisbon pod's future is already being read as bad news, and the longer it holds the more participants assume the worst.

> "With the hiring freeze and everything changing, I just want to know if the remote pod is part of the long-term plan or if we should be worried."
>
> PARTICIPANT 3

> "when freezes drag on and new leaders come from bigger companies, people start wondering if remote pods are on the list."
>
> PARTICIPANT 74

> "If the pod's staying, say that. If there are conditions or it depends on something, say what."
>
> PARTICIPANT 82

DEEP DIVE · WHAT ELSE WE LEARNED

Themes outside the dimensions you set up.

The top 3 themes: Recurring handoff problems were vented locally but not raised to leadership; Staff worried the new leader would add process and standardize everything; Many staff had not yet met the new leader or heard their priorities.

THEMES · 3

Recurring handoff problems were vented locally but not raised to leadership 16 of 100 participants

Participants framed the handoff pain as venting or complaining, and each assumed a lead or a peer would carry it upward.

Recurring operational pain may not reach the new leader through normal channels; what sounds like venting in standups is the actual escalation.

> "We mention it in standups sometimes, but it feels like complaining, so people don't push it hard."
>
> PARTICIPANT 83

> "I haven't raised it directly myself—I figured my lead would if it was a real issue."
>
> PARTICIPANT 72

> "I haven't raised it directly — I'm still pretty new and didn't want to step on toes."
>
> PARTICIPANT 28

Staff worried the new leader would add process and standardize everything 14 of 100 participants

Staff feared approvals and standardization would cost them the speed and tailoring customers currently feel.

Staff read speed and per-customer tailoring as the source of their quality, so early process moves may land as threats to what customers currently feel.

> "If I have to get three approvals to spend an extra day onsite, we'll lose what actually makes us good at this."
>
> PARTICIPANT 89

> "now I can see a problem, fix it, and document it after. If that flips to "check first, then act," we'll lose speed and customers will feel it."
>
> PARTICIPANT 62

> "I haven't met Renata yet, so I don't know her style. But when you come from a bigger company, sometimes there's more pressure to standardize everything, and I just hope we don't lose the ability to tailor things when a customer needs it."
>
> PARTICIPANT 41

COUNTERPOINTS · 6 PARTICIPANTS

> "If we standardized, we'd probably catch more of these issues before go-live."
>
> PARTICIPANT 86
>
> Sees standardization as a fix for quality problems, not a threat.

> "We need standards so customers don't reach us half-done."
>
> PARTICIPANT 96
>
> Asks for standards rather than fearing them.

> "Some basic standards would help too — two plumbing accounts hit the same data issue last quarter, one got a free implementation week and the other didn't."
>
> PARTICIPANT 25
>
> Wants standards so similar customers get the same treatment.

> “Maybe just standardizing what gets documented at handoff? Like a checklist or template so we're all capturing the same things consistently.”
>
> PARTICIPANT 90
>
> Asks for a standard handoff template.

> “Either slow down go-lives until setup's actually done, or give us a real handoff checklist that both sides sign off on.”
>
> PARTICIPANT 78
>
> Asks for a formal checklist both teams sign.

> “Maybe a clear handoff checklist or criteria that says "these things must be done before Account Support takes over," and then a defined escalation path if something's missing.”
>
> PARTICIPANT 49
>
> Asks for written handoff criteria and a defined path.

Many staff had not yet met the new leader or heard their priorities 10 of 100 participants

Lisbon staff missed the new leader's all-hands in their evening hours and have since had no direct read on them or their plans for the remote pod.

Lisbon participants who raised this have not yet heard from the new leader directly and are unsure whether the remote pod figures in plans.

> “Renata's all-hands was in my evening, so I haven't really met her yet or heard her priorities firsthand.”
>
> PARTICIPANT 10

> “Renata's all-hands was in our evening, which is typical—we exist in the org chart but sometimes it doesn't feel like leadership knows we're here.”
>
> PARTICIPANT 74

> “I haven't met Renata yet — her all-hands was in my evening — so I don't know what she thinks about the remote pod or if we're part of her plans.”
>
> PARTICIPANT 82

METHODOLOGY

HOW THIS REPORT WAS BUILT

How we collected this

Each participant had a voice conversation with the Savo agent, which asked open questions about the topic at hand.

How we found the themes

We break each conversation into short quotes, then group the ones that say similar things. Those groups are the themes — the ideas that kept coming up, in participants' own words. Nothing is scored on a scale here; we just show what people actually said.

The dimensions we asked about

Before the interviews we picked a handful of dimensions to be sure to cover. You'll see those tagged on the findings. The themes are what people brought up — sometimes right on those dimensions, sometimes beyond them.

Where people pushed back

For each theme we also look for quotes that disagree with it, and show them under each theme — so a pattern doesn't get overstated.

What we put up front

The Summary leads with every dimension you set up. Themes outside them are under What else, and every theme and quote is in the online report.

Where this report stops

We tell you what we heard and what it means. We stop before making recommendations — those need cost and context the system doesn't have, so it doesn't guess.

EVIDENCE UNIT

Evidence unit

The smallest bit of a conversation worth looking at on its own — usually one concrete thing a participant said, tied to a word-for-word quote.

KIND OF EVIDENCE

Each quote is sorted by how concrete it is, from Story to Claim.

Story

Something that happened, what they did and how it turned out. It covers what led up to it, the action and the result, so you could retell it.

Example

Something specific they did, without the full story. It's a real action, but part of the story is missing, like what prompted it or how it ended.

Claim

An opinion, belief or habit, not tied to a specific moment. This includes "I always..." and "I would..." statements.

Counterpoint

A quote that pushes back on its theme. It also has its own kind (Story, Example or Claim).