

Public & Social Sector Practice

# Managing presidential transitions: Five tips for agency review teams

Agency review teams are often the largest function of governmental-transition organizations and critical for continuity of government. A few best practices can help maximize their effectiveness.

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**“Agency review teams”**—groups of transition staffers who work closely with officials in each federal agency to understand ongoing activities, budgets, pending regulations, and other information to allow incoming personnel to hit the ground running—are among the most critical continuity-of-government elements for postelection transition teams to get right.

These teams typically involve hundreds of transition staffers collaborating with career officials to ensure a smooth transfer of power. Agency review team members are also, in practice, the initial “face” of the administration for agency staff, making an important first impression and setting the tone for relationships going forward, when career civil servants will support the new administration in managing the government and delivering services to citizens.

Participants on both sides—political and career civil service—share five tips and tricks for transition-team leadership to consider as they stand up and run these critical agency review teams.

## 1. Recognize that composition matters most

The most effective agency review teams include a wide range of personnel that deliver the relevant range of expertise, perspectives, and capabilities. Transition teams putting together agency review teams could ask the following questions:

- *Do we have a full range of the required expertise?* While policy expertise is typically well represented, other elements are sometimes overlooked. These include representation of key functional areas (such as IT and analytics) and project-management expertise to keep operations running smoothly.
- *Have we included a broad, diverse range of perspectives?* Transition-team leadership should consider whether or not agency review teams reflect the diversity (broadly defined) of the country they serve. Extensive research shows that diverse teams are more successful and make better decisions.<sup>1</sup>
- *How are we balancing “fresh eyes” and “old hands”?* Having political appointees and former civil servants with deep experience in the relevant agency on the team can be especially helpful when there is a need to get up to speed quickly. However, relying too heavily on this group can result in biases or incorrect assumptions that can diminish the objectivity of the team. Leadership should, therefore, aspire to build teams with an appropriate mix of outside experts and those with prior agency experience.
- *Are we positioned to deliver?* A common challenge for past transition teams has been lack of balance between expert “thinkers” and hands-on “doers.” A team without enough doers may not deliver at the pace required. Thoughtfully integrating hands-on managerial leaders alongside junior staff to serve in support roles can help ensure the work gets done.

## 2. Think about continuity ahead of time

Serving on an agency review team is an opportunity for future appointees to get up to speed on an agency. However, some team members that will go on to serve in the agency can get distracted by their own preparation for a future role instead of focusing on the broader needs of the full transition team during the postelection period. Previous transition teams have addressed that issue with two different approaches:

- a. *Build teams of people who are likely to go on to serve in that agency.* This approach helps provide continuity, build expertise, and ensure incoming leaders are prepared. However, it requires carefully managing potential power and staffing dynamics within the team.
- b. *Build teams of people who are unlikely to go on to serve in that agency.* This approach helps teams focus on creating the right deliverables, rather than finding the right job in the agency. However, it can lead to a

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<sup>1</sup> Sundiatu Dixon-Fyle, Kevin Dolan, Vivian Hunt, and Sara Prince, *Diversity wins: How inclusion matters*, May 2020, McKinsey.com.

longer ramp-up and onboarding period for appointees who did not have the transition period to get up to speed on the agency.

### 3. Be thoughtful about the size of agency review teams

Participants in previous transitions cautioned against the tendency toward becoming too large. Prior agency review teams have ranged from 200 to 500 paid staff and volunteers. In the past, agency review teams have been used as a “soft landing” for junior staff who may not have sufficient experience or directly applicable skill sets for filling other roles. As a result, agency review teams have sometimes ended up two- to three-times larger than required, stretching managerial, HR, and other resources and causing confusion about roles.

### 4. Be rigorous about information-sharing processes

Agency review teams gather information that is critical to share with many other functions within the transition team. Given the sheer number of individuals involved, however, insufficient coordination between these functions has been common. Establishing effective and clearly defined collaboration paths between functions requires upfront work to clarify the processes and communicate and reinforce them. Previous transition participants highlighted these three areas as especially important:

- *Collaboration between interdependent agency review teams.* Build in ways for interdependent agency review teams to coordinate on overlapping policy-implementation issues (for example, national security issues that may need the attention of the Department of Homeland Security, the Department of Defense, the State Department, and others).
- *Collaboration between the policy team and agency review teams.* Ideally, members of the

policy team work closely with relevant agency review teams to understand the comprehensive set of areas each agency is responsible for and whether or not policy-implementation plans are feasible.

- *Collaboration between personnel and the agency review team.* The agency review team can provide important insights about what skill sets or traits may be helpful in certain roles (for example, recommending more political appointees than the current administration has in a particular office and how senior they should be).

### 5. Set the tone for agency review teams to start off on the right foot

Agency review teams come into agencies excited about the election win, ready for action, and, sometimes, with bold ideas for change. Agency transition directors and other civil servants bring deep expertise and extensive knowledge of ongoing activities, long-term context, and what has worked (or not worked) in the past.

Transition leaders can reinforce values for effective collaboration between members of the agency review team and civil servants, including maintaining a learning mindset, listening to agency priorities and concerns, and focusing on building long-term relationships. Adopting that mindset can ensure a productive two-way conversation, can unlock a tremendous amount of value, and can set a strong foundation to get started.

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Done well, agency review provides the right information and establishes the kinds of relationships in agencies that an incoming administration will need to be successful. Transition teams should consider these five practices to enable the agency review team to be highly effective.

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