

## Mastering Transitions Ten Tips for Transition Success

Author: Dave Ulrich . August 2020

How well do you manage the transitions in your life?

Managing transitions well is a significant skill because all of us face many types of transition throughout our lifetime:

- Physical transitions where we move from one place to another.
- Emotional transitions as we create new identities (e.g., single to married to divorced; student to employed; employed to retired).
- Social transitions when we find, retain, and evolve relationships.
- Professional and career transitions with new companies, titles, or responsibilities.
- Spiritual transitions as we evolve our beliefs, sources of meaning, and understanding of the divine.

As the world emerges from the coronavirus hibernation and intense scrutiny of racial concerns, each of the above (and other) transitions will likely occur for most individuals, organizations, and societies. While transitions are often idiosyncratic, broad lessons can be derived from general experience and research. Below is a ten-item checklist I use to coach individuals or leaders through a professional transition: these principles also apply to organizations and societies experiencing transitions.

1. **Leave on good terms or respect your past.** Transitions imply moving on, but when moving ahead, we are well-served to leave on good terms with those left behind. Whether our transition is by choice or fiat, thanking those who were part of the previous experience through public affirmations or private notes can leave good impressions. *What do I want my legacy identity to be?*

2. **Take time to let go.** Thoughtful author William Bridges talks about accepting and working through the psychological states of transition: disengagement (letting go), disidentification (leaving and gaining new identity), disorientation (being lost in a new place), and disenchantment (facing discomfort with the uncertainty of change). Leaving the past before beginning the future helps focus more on what's next. *How do I let go of my present before moving into my future?*

3. **Bring knowledge with you.** Knowledge and relationships are the two connectors through any transition. Bring your knowledge, but remember that knowledge about what worked in one setting may not work in another setting, so ideas need to be adapted and not just adopted. *What have I learned and how can those lessons be adapted to my new setting?*

4. **Retain relationships.** Relationships endure across transitions of time, role, or place, and create social networks of support. Retaining relationships may be as simple as periodic updates, but they can be more complex by maintaining on-going in-person connections. Former relationships amazingly often

become central to current issues. *Who are the people I want to stay connected with?*

5. **Carefully observe your new setting.** Learning to observe insightfully is a talent and discipline. New opportunities sometimes require bold, sudden changes when they require a new direction. At other times, the new normal evolves by observing, asking, and listening with questions like:

- What are the indicators of success? What drives those outcomes?
- What has worked here and what has not? Why?
- What is valued and what are the core values?
- Who are key stakeholders in this setting and what do they want or need?
- What unique skills do I bring to this situation?
- Whom do I need to enlist to shape my agenda?

Sometimes early observations can be wrong but observing before acting is often better than no observation. *What do I observe and feel about my new setting?*

6. **Initiate when appropriate.** Discerning when and how to move from observing to doing can be difficult, but the time comes when sponsoring new ideas in a new setting becomes appropriate. New actions come from both formal events and informal conversations. Discover what is required for early success and balance the paradox of changing too much and changing too little. *How do I take actions that will have impact?*

7. **Honor your predecessors even as you shape your agenda.** When moving into a new role or position, appreciate your predecessors with public comments and private notes. Your new agenda will likely evolve their previous work, but if this evolution builds on (rather than belittles) what others have done, it will likely have more success. *How do I show gratitude to those who have gone before?*

8. **Involve others.** Leadership is not an individual but a team activity. In transitions, engage others in defining and solving problems. Show curiosity by asking questions, proposing alternatives, and seeking guidance. Involving others increases your insight and extends your influence. *Who can help me make progress?*

9. **Institutionalize changes.** Transitions are often shaped by events (a presentation, symbolic action, new vision statement), but they are sustained when events become patterns. Patterns are shaped by institutional mechanisms around how to manage people (HR practices of staffing, training, promotions, compensation), how to govern (set a vision, make decisions, hold meetings), how to allocate resources (establish a budget, set priorities), and how to share information (communication, reporting procedures). These institutional mechanisms ensure the sustainability of ideas with impact. *How can my ideas become woven into institutional practices?*

10. **Keep moving forward.** Not all transitions will work and even if they do, initial efforts need to evolve. Marriages, new jobs, and relationships often go through somewhat predictable phases: from honeymoon (all is great) to power (who is in charge) to withdrawal (isolate) to transformation (move forward). To reach the transformation stage, encourage stories that connect the past to the future so that

there is a narrative of how yesterday's stories link to today's efforts. *How do I continually adapt and evolve as I move forward.*

The transition checklist actions below may help you take a personal audit of how you are managing your transitions. As individuals, organizations, and societies move through the stages of managing the coronavirus (from respond to recover to reinvent), these ideas might turn transitions from threats into opportunities.

## **Transition Checklist Actions**



*Dave Ulrich is the Rensis Likert Professor at the Ross School of Business, University of Michigan and a partner at The RBL Group, a consulting firm focused on helping organizations and leaders deliver value.*

<https://thehumancapitalhub.com/articles/Mastering-Transitions-Ten-Tips-For-Transition-Success>