

# MANAGING TRANSITIONS: CHECKLISTS

*Based on the work of William Bridges, PhD with Susan Bridges*

## MANAGING THE END OF THE OLD

- Study the change carefully and identify who is likely to lose what, including yourself.
- Understand the subjective realities of these losses for the people experiencing them.
- Acknowledge these losses with empathy.
- Allow people to grieve and protect them from well-meaning attempts to prevent them from expressing anger or sadness.
- Publicly express your own sense of loss.
- Find ways to compensate people for their losses.
- Provide accurate information repeatedly.
- Clearly define what is over and what is not.
- Find a way to mark the ending.
- Avoid denigrating the past, and where possible, find ways to honor it.
- Plan to give people something from the past to take with them.
- Make it clear how the ending is necessary to protect the continuity of the organization or its key conditions.
- Ensure the ending is significant enough to complete the transition in one step.

## MANAGING THE 'NEUTRAL ZONE' PERIOD IN BETWEEN THE OLD AND THE NEW

- Normalize the neutral zone by explaining it as an uncomfortable period that can be turned to everyone's advantage.
- Redefine the neutral zone by selecting a new metaphor to describe it (e.g., instead of “sinking ship” use “last voyage”).
- Reinforce the new metaphor with updated training, policy changes, and financial rewards to motivate people to keep doing their jobs during the neutral zone.
- Adequately protect people from unnecessary further changes.
- If you can't protect them, cluster those changes in a meaningful way.
- Create temporary policies and procedures to guide people through the neutral zone.
- Establish temporary roles, reporting structures, and organizational groupings necessary to navigate the neutral zone.
- Set short-term goals and checkpoints.
- Define realistic output objectives.
- Identify special training programs needed to address challenges in the neutral zone.
- Find ways to ensure people feel they still belong to the organization and are valued.
- Set up one or more transition monitoring teams to provide realistic feedback flowing upward.
- Step back and assess how things are being handled.
- Provide others with opportunities to do the same by offering resources such as facilitators or survey instruments.
- Ensure people build their skills in creative thinking and innovation.
- Encourage experimentation and ensure people are not criticized for intelligent efforts that do not pan out.

- Work to transform the organization's losses into opportunities.
- Set an example by brainstorming multiple solutions to problems.
- Regularly check that you're not pushing for certainty and closure when it may be more beneficial to foster creativity.
- Use the neutral zone as an opportunity to create integrated systems throughout the organization.

## MANAGING THE NEW BEGINNING

- Distinguish in your own mind and in your expectations of others between the start and the beginning.
- Accept that people may feel ambivalent toward the beginning.
- Take care of the endings in the neutral zone, and avoid forcing the new beginning before it's ready
- Clarify and communicate the purpose of the change.
- Paint a clear picture of the change's outcome and find effective ways to communicate it.
- Create a plan to guide people through the phases of transition.
- Help people discover the role they will play in the outcome of these changes.
- Ensure that everyone has a role in the transition management process and understands their part.
- Check that policies, procedures, and priorities align with the new beginning.
- Watch your own actions to ensure you are effectively modeling the attitudes and behaviors you expect from others.
- Find ways to reward people for becoming the new individuals they need to be.
- Build quick wins into the plan to help people rebuild their self-confidence.
- Find ways to celebrate the new beginning and the conclusion of the transition.
- Find ways to symbolize the emerging new identity, both organizational and personal, resulting from the transition.
- Give people a memento of the transition as a reminder of the difficult but rewarding journey they went through together.

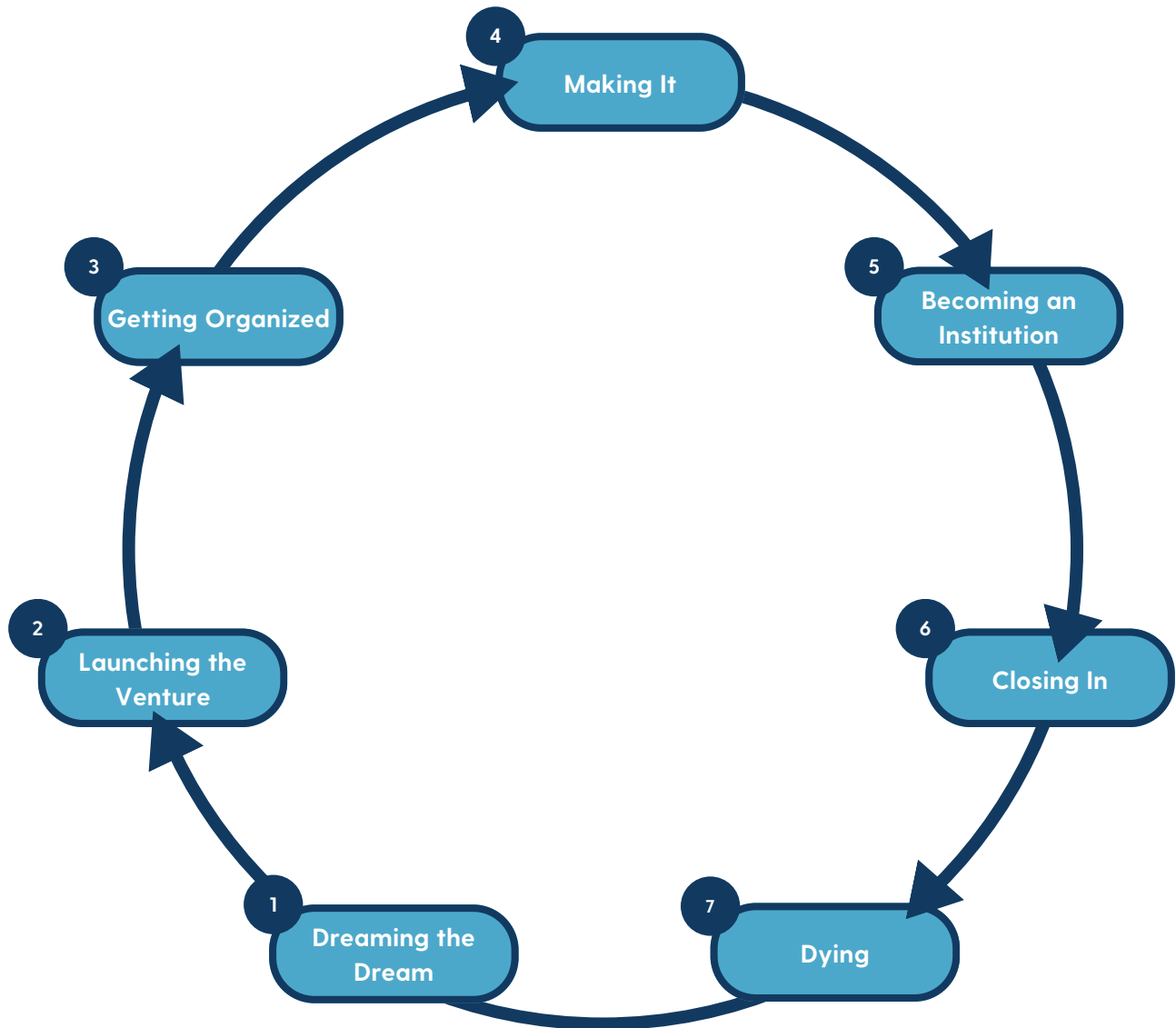
## MANAGING A WORLD OF NONSTOP CHANGE

- Accept the fact that nonstop change is an unavoidable reality today.
- Orchestrate transition management tactics effectively, shifting smoothly from one change situation to another, and from ending to beginning.
- Develop an overall mental picture in which each particular transition makes sense.
- Be careful not to introduce extra, unrelated changes while people are still struggling with the transition.
- Make, and encourage others to make, life cycle projections to identify and start replacing policies, systems, and structures that have passed their midlife points.
- Include worst-case scenarios in change management plans for both their own sake and for contrarian planning purposes.
- Plan and manage the transition from occasional change to making change the norm, and encourage others to do the same.
- Honestly view the status quo as a temporary and expedient resting place.
- Discuss change as the best way to preserve the essential continuity of the organization.
- Clarify the organization's purpose and help others do the same at their level of the organization.
- Distinguish purpose from objectives.
- Work to unpack any baggage, heal old wounds, and address unfinished business.
- Regularly work to solve the organization's problems.
- View the organizational environment as a challenge that demands a creative response.

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## THE SEVEN STAGES OF AN ORGANIZATION



Organizational Lifecycle, *Managing Transitions* (p. 89)