

## Managing Abrupt Transitions from Afar – Checklist

*By Nancy Settle-Murphy, Guided Insights and Beverly Winkler*

When employees are moved from one organization to another, whether it's voluntary or forcible, the transition can be tough for everyone involved: the current manager, the new manager, and most of all, the employee who is making the move.

Here are some tips to help each member of this "leadership triangle" ensure a smooth transition: the current manager who wants to help the employee make a graceful exit, the new manager who wants to earn the trust and respect of the incoming employee, and the employee facing the prospect of moving to uncharted territory. All three need to engage in a series of candid conversations to establish a transition plan that feels right from all perspectives.

### *Current (and soon-to-be former) manager:*

- ✓ **Define the communication "whys" jointly with the new manager.** Be prepared to explain candidly why this impending move is necessary, why (or if) it represents an opportunity, why their skills and experience are needed, how this change can represent a significant leap in their growth development plan, and why the change has to take place *now*.
- ✓ **Determine how and when to best communicate the change with your employee.** This might be best done by your meeting alone with your employee first. (Of course, face-to-face would be the first choice; a video call may have to suffice). In some cases, meeting with your employee and the new manager at the same time might be better. Remember: This should be a series of conversations, not a once-and-done meeting.
- ✓ **Acknowledge the surprise and pain your employee (and you) may be experiencing.** Let the employee know that you realize this move may come as a shock, and that the change may not feel welcome, especially if you two have had a close relationship. Acknowledge your own sense of loss in whatever way you feel is appropriate. It can be tricky balance: By keeping a stiff upper lip, you may be inadvertently telling your employee that losing them on the team doesn't really matter much. On the other hand, by expressing too much regret, you may be deepening your employee's sense of loss.
- ✓ **Collaborate on a transition plan to determine how the employee's current responsibilities will be transitioned,** to whom, and by when. Be realistic about how much your employee will really be able to assist their former team once they join the new one. Agree on a means by which the employee can make sure your team benefits from their knowledge, resources, contacts, notes, etc., minimizing the need for panicked requests for assistance later on. Discuss how long it may make sense for your employee to continue to participate in team meetings or 1:1s, and explain why they may be seeing meeting cancellation notices in the future.) Establish an end date that

you both can agree with. Reach an agreement as to how much work, if any, your employee can expect to take on for the new team during the time of transition. Let your employee know that they can reach out to you and other team members when needed.

- ✓ **Agree on how (and how often) you and your departing employee will communicate in the future.** While it's tempting to offer that they can reach out at any time, this may be both unrealistic and undesirable. Unrealistic, because you may simply not have the time to drop everything for someone no longer on your team, especially if the employee is frequently seeking guidance or a chance to vent. Undesirable, because you may be encouraging a sense of continued mutual dependency at the expense of the building a trusting relationship with the new manager.
- ✓ **Stay in touch.** Reach out from time to time to let them know you're thinking about them, whether it's to send a link to an article of interest, asking about what they've learned so far, inviting them for a quick chat, or having coffee or lunch if you're in the area. Remind them that even though you no longer work together, you care about their career and well-being.

### *New Manager/Team Leader:*

- ✓ **Partner with the former manager and your new employee on a reasonable transition plan.** Even if you need this new employee on board "yesterday," you will all need time to make a smooth transition. Find out how much time will be needed to move your employee's current initiatives to others. Beware of plans that call for the new employee to be "available as needed" to their former team; clean breaks usually work best, even if it means postponing the start date by a week or two. However, there may need to be a brief period has accountabilities in both groups, but this should be the exception rather than the rule.
- ✓ **Define the communication "whys" jointly with the current manager.** *(See earlier bullet above)* In addition to expressing gratitude that the new employee is joining your team, praise your employee for their expected contributions to the success of this project/team and emphasize the growth opportunities you envision for them in this new role. Assure them that this is not merely a "lateral" move, but instead, it's a real opportunity for professional growth, which you are personally committed to help shepherd them through.
- ✓ **Identify your first touch points with the employee.** Introduce the employee to the team and their resources. Share the team's strategic goals, deliverables, operating principles, defining culture, and give them a who's who of key business partners and other important stakeholders. Review important milestones, key dependencies and critical success factors. Map out team communication channels, and how each one is typically used. Note: This initial overview does not replace the need for a more thorough onboarding plan *(See below)*.
- ✓ **Develop a 90-day transition plan for assimilating your employee into the team.** This is especially crucial for remote team members who may have few connections to the new team or other key stakeholders. Create a list of people, by name and role, for the new employee to

meet in their first week, month, or first few months. (Even better: Send emails to introduce your new team member to make it easier for them to schedule time to meet.) Indicate which meetings are mandatory and why. Run interference as needed, helping your new employee to remove obstacles along the way and gain entry to the right people.

- ✓ **Check in frequently to see how the employee is managing the transition.** Be empathetic. Ask what is and is not working. Find out how the wrap-up of old projects is going, and whether they're meeting the right people. Are there questions they need answers to? Since you and your employee can't easily meet in person, your weekly 1:1 meetings will be the best way to build a mutually trusting relationship. Come prepared with insightful questions and observations to stimulate meaningful conversation. (E.g. "What was your biggest 'aha!' this week and how did it make a difference in your work?" Or, "In our team meeting, you mentioned some valuable lessons learned from project X. Tell me more.") Encourage your new employee to come with questions, too. An essential part of every conversation: Ask what your employee needs from you to be successful. Make these weekly meetings sacrosanct.
- ✓ **Learn about each other's communications preferences, styles and expectations.** For example, if you typically prefer emails for certain things, calls for another, and Slack for something else, say so. Ask about your employee's preferences, too. Discuss expectations about response times, especially during crunch periods. If your organization uses DISC or MBTI or something similar, share your profiles (and that of your team members) and discuss the implications.
- ✓ **Discuss their performance goals and development plan.** Highlight opportunities for learning and growth as a part of most conversations. For example, find articles, books or training programs that can help your employee develop skills and knowledge they're seeking. Assign them to projects that will boost their visibility and stretch them in new ways. Invite them to mentor or be mentored by other team members, even if informally. Demonstrate that you're committed to their professional growth in meaningful ways.
- ✓ **Share feedback you may be receiving.** As the new manager, you are effectively serving as a coach throughout the transition process. Once you have agreed to clear performance goals and critical success factors, discuss feedback you may have received, ask them for theirs, and be prepared to share your observations. This should be taking place during every 1:1, or more frequently. (Feedback works best when given in the moment whenever possible.) Link to Feb Communique. Emphasize what they're doing well in the early stages, and express your commitment to working with your employee to ensure their success in the future. Be specific about ways you can help, and where you'd like your employee to take the initiative first.
- ✓ **Beware of making promises you can't deliver on.** A real test of your credibility as a leader will be the extent to which you follow through on commitments you make. Far better to be realistic about what you can do for your employee, vs. blithely making promises that may sound good in the moment, but which you can't possibly fulfill. For example, don't promise a promotion or salary increase within certain period of time if you have little control over raises.

## *Transitioning Employee*

- ✓ **Draft your own transition plan.** Your former and new manager will be doing this as well, but don't wait for them to think of everything. Demonstrate your initiative. Consider what you are currently working on that needs to be transitioned while identifying what you need to learn about your new role. Review this list with your former and new manager. The key is flexibility in the plan.
- ✓ **Set up time with your new manager.** Prepare questions to ask about their background, their current initiatives and how they see you as a key member of the team. Be prepared to share your background, your successes and your career aspirations. Share your ideas for the transition plan and ask how they see prioritizing your actions. Ask about their communication style and their preferences. How often will you meet? How accessible are they? Do they prefer phone calls, emails, IMs? Are there team norms for how the team is to work together? What else do they suggest adding to the transition plan?
- ✓ **Ask, listen and understand your new goals.** Ask questions about key projects you may be working on, the client or business sponsor, your accountabilities and decision-making authority. Think in terms of SMART goals (Specific, Measurable, Actionable, Results, Timing). Ask how the work of this project and other initiatives get done. How do team members work together? Who does your manager want you to work with, and who's accountable for what? Who reports to whom? How is success reported on, tracked and measured? Share your ideas and suggestions as you go along.
- ✓ **Seek out your new team members.** This new experience provides a wonderful opportunity to expand your work network. Take charge and set up meetings – don't wait for them to contact you! Ask your new colleagues about their experiences and how they see your involvement on the team. Probe to find out how the team works together when things are going well and how they work in crisis mode. Ask your new colleagues to suggest others to meet. Always listen, don't judge. Share your ideas only after hearing their ideas, and resist the temptation to let them know about "better ways" to do things until after you've built a relationship.
- ✓ **Keep in touch with your former manager and teammates.** Ask how the projects you were involved with have wrapped up and what impact they had to the business. Offer to make introductions to new people you've met from your new team. Share with your former manager what you have learned and what excites you about your new role. In time, your former manager may become a great mentor in your career plan.