



## **Strategies to Help People During Transition**

*(Source: William Bridges, Managing Transition: Making the Most of Change; and Scott, C.D. & Jaffee, D.T., From Crises to Culture Change)*

**What:** People have different needs at different stages of transition. This tool will help you develop strategies that are responsive to people's needs at each stage of transition.

**Why:** During transition, doing the right thing at the right time can make all the difference to the success of your plans.

**When:** Use this tool when you need to communicate a change, build commitment for a change, anchor a change or renew your team, department or unit after a change.

**How:** There are two stages to developing and implementing successful transition strategies.

- 1) Get organized
- 2) Plan strategies to help people during transition

## 1) Get organized

What changes do you anticipate, how might this affect the workplace?

Who needs to be involved in the group that will help you guide the transition?  
(See *Enlisting Others*)

What communication strategies will you use? (See *Strategic Communication During Change*).

## 2) Plan strategies to help people during transition

First you need to assess where people are in the transition process (see *Understanding People's Response to Change*). Based on that assessment and the following charts, you can develop your strategies. (See *Tips and Pitfalls on Page 7*).

<b>Not Yet in Transition (Denial)</b>	
<b>People need help to understand the change and how it might affect them</b>	
<b>Strategies for this phase of transition</b>	<b>Tips for this phase of transition</b>
<ul style="list-style-type: none"> <li>◆ Meet with staff (see <i>Managing Change</i>) to:</li> <li>◆ Explain why the change is happening</li> <li>◆ Outline the details of what is changing and what is not</li> <li>◆ Explain the impact of the change</li> <li>◆ Ask for reactions</li> <li>◆ Give people time to express their concerns</li> <li>◆ Respond to questions and clear up misunderstandings</li> </ul>	<ul style="list-style-type: none"> <li>◆ Set up mechanisms for people to communicate their concerns, issues, ideas and suggestions (eg. Feedback meetings suggestion boxes, anonymous email line)</li> <li>◆ Keep a record or list of “issues, questions and concerns” that need to be addressed</li> <li>◆ Be visible, open, honest and empathetic</li> <li>◆ Be specific about work tasks Encourage people to take care of themselves, physically, spiritually and emotionally (eg. EFAP, exercise, time out, regular work hours)</li> <li>◆ Discuss any resulting transfers, bumping or displacements with Human Resources well in advance</li> </ul>
Your thoughts and ideas for helping people understand the change and how it might affect affect them:	

<b>Endings (Resistance)</b>		
<b>People need help dealing with losses, concerns, issues and fears</b>		
<b>Strategies for this phase of transition</b>		<b>Tips for this phase of transition</b>
<ul style="list-style-type: none"> <li>◆ Identify who is losing what because of the change and think about ways you can help deal with the losses</li> <li>◆ Meet with staff to follow up the announcement (see <i>Managing Change</i>)</li> <li>◆ Listen to and acknowledge the questions, concerns, reactions, fears and losses</li> <li>◆ Answer questions, clear up misunderstandings and let people know you will get answers for outstanding questions</li> <li>◆ Keep a list of issues, questions and concerns to be addressed over time</li> <li>◆ Help people look at pro's and con's, possible positive outcomes, opportunities and solutions</li> <li>◆ Remove things (tools, systems, etc) that would encourage people to hang on to what was</li> </ul>		<ul style="list-style-type: none"> <li>◆ See <i>Handling Resistance</i></li> <li>◆ Record questions and concerns you cannot respond to and tell people when they can expect a response Remember you can't eliminate all resistance focus on reducing needless resistance enough to allow the change to progress</li> <li>◆ Try to differentiate between authentic and false resistance. False resistance has nothing to do with the current change.</li> <li>◆ Ask people to be specific about their objections</li> <li>◆ Offer information more than once and in several ways (e.g. Meetings, forums, newsletters, printed notices, communication books, notice boards, posters)</li> <li>◆ Hold events to help people break with the past (e.g. Tea, barbecue, lunch, ceremony, distribute mementoes)</li> <li>◆ Invite involvement in the process (planning events, putting together notice boards)</li> </ul>
<p>Who is affected? (eg. Individuals, teams, groups, customers, patients, stakeholders)</p>	<p>What are they losing? (eg. Relationships with peers, boss, sense of belonging, kind of work, sense of control, feeling of competence, trust, status, turf, etc.)</p>	<p>What will you do to help people with their losses? (eg. Acknowledgement, replace with something else, restore them in the change, help people grieve or say good-bye)</p>

<b>Neutral Zone (Exploration)</b>	
<b>People need help getting organized and exploring options</b>	
<b>Strategies for this phase of transition</b>	<b>Tips for this phase of transition</b>
<p>Help people get organized and reoriented by:</p> <ul style="list-style-type: none"> <li>◆ Setting up systems and structures (even if temporary)</li> <li>◆ Developing policies and procedures (even if temporary)</li> </ul> <p>Meet with people to:</p> <ul style="list-style-type: none"> <li>◆ Ask for their support for and commitment to the change</li> <li>◆ Brainstorm around specific implementation issues that affect them</li> <li>◆ Encourage them to contribute and try out their ideas</li> <li>◆ Set up new priorities and balance workloads</li> <li>◆ Develop strategies for teambuilding</li> </ul>	<ul style="list-style-type: none"> <li>◆ Be prepared and use several different vehicles to explain and re-explain the purpose, desired outcomes and the part each person can play</li> <li>◆ Hold events to welcome the new (people, system, etc.). Use teas, lunches, ceremonies, banners, cards, flowers, etc.</li> <li>◆ This is a good time to assess training needs and develop training plans that support your goal</li> <li>◆ People may be ready to explore new career opportunities and look at their own skills, knowledge and abilities in the light of new competencies required in the workplace</li> </ul>
<p>What systems, structures, policies and/or procedures (temporary or permanent) would help?</p> <p>How will you ask people for their support and commitment?</p> <p>What can you do to build/rebuild this team?</p> <p>What training and skills do you think people need?</p>	

<b>New Beginnings (Commitment)</b>	
<b>People need help adjusting and making the change work</b>	
<b>Strategies for this phase of transition</b>	<b>Tips for this phase of transition</b>
<ul style="list-style-type: none"> <li>◆ Involve people in implementing and monitoring the change</li> <li>◆ Implement training plans</li> <li>◆ Continue teambuilding efforts (see <i>Launching and Refueling Your Team</i>):               <ul style="list-style-type: none"> <li>◆ Vision, mission</li> <li>◆ Roles and responsibilities</li> <li>◆ Systems and procedures</li> <li>◆ Build relationships</li> <li>◆ Recognize and thank people for their efforts and accomplishments (see <i>Giving Recognition</i>)</li> </ul> </li> <li>◆ Celebrate successes</li> </ul>	<ul style="list-style-type: none"> <li>◆ Keep offering the opportunity to explore new career planning</li> <li>◆ Publicize successes (no matter how small)</li> <li>◆ Have a cake and coffee session</li> <li>◆ Send personal notes and thank you's</li> <li>◆ Hold special events</li> </ul>

**Tips:**

Often during the early stages of a change people will be asking for information and answers.

Ask people what worked and what did not work in past changes and what they need during this change.

Ask people how they want to be kept up-to-date.

Discuss the phases of transition and reactions to expect (see *Understanding People's Response to Change* and *Taking Charge of Change*).

Encourage others to express their fears, concerns or needs in order to help them work through those feelings and return their focus to the task at hand. (See *Personal Strategies for Navigating Change*).

Provide clear, timely and continual information at every opportunity, even if only to let people know what is still to be decided or what is not yet known.

Let people know you are keeping track of things that need to be addressed.

**Pitfall:**

If you try to suppress people's reactions, they may surface later in more destructive ways and be much more difficult to handle.

Pushing people to do things or not offering people the things they need, can cause problems. **Timing is everything.**