5 Tips for Successful Transitioning

by Dale Smith, CEO

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MANAGEMENT TRAINING & CONSULTING SERVICES, LLC

Smith Management Training & Consulting Services operates on the premise that for individuals & teams to succeed they have to Work Hard, Love Hard & Play Hard!

Our mission is to help individuals & teams reach their common goals & develop strong relationships while doing it.

With that thought in mind, let's discuss transitioning!

Transitioning

It looks and sounds simple! Usually people think "I am good at what I do and I have been rewarded by getting a promotion and now I have arrived", but the promotion is only the beginning. I have witnessed time and time again that people don't understand the thought that needs to go into transitioning into another role, specifically if you are supervising people. I think that the process of applying for a job, interviewing and accepting the new job gets more of the attention sometimes than the actual start of the job. This is where I want to help you avoid some of the things that I see on a regular basis that continues to have supervisors starting behind the curve.

I will also say, THIS IS NOT ROCKET SCIENCE!

TIP #1 Develop a formal introduction beginning the first day.

This is the FIRST thing that should be accomplished when moving into a new role. This should be completed whether you are transferring into a new position in your current organization or whether you are starting at a new agency. The introduction sets the tone for the future. A formal process really makes you think through the steps and allows you to be PURPOSEFUL in your approach. This process also allows to establish Leadership right away and establish a consistent message. I have heard time and time again that people show up for the first day and just go to work, never meeting their team or have any opportunity to get to know them. This process will make sure that does not occur.

First – Meet with Direct Reports as a Team & Set Expectations

What works well in this scenario is to first introduce yourself, share your background and why it was important for you to become a part of this team. Then have your direct reports introduce themselves and tell a little about their background. After the introductions, follow an agenda that is purposeful. Discuss expectations – what they can expect from you and what you expect from them. This interaction should be specific but uplifting. It should include your value system as a manager and should indicate why those are important to you and the company. Along with that you should be prepared to talk about your thoughts on the future and what you generally hope to accomplish. This should be clear and concise so that everyone there is clear on the direction when they leave. Being clear and concise is important for the start of any transition.

Second – Schedule Direct Report Interviews; Make Formal & Consistent

This also is a very important piece to establishing leadership and understanding the dynamics occurring within the agency. The key to this is consistency. An agenda should be developed to assure that each employee is addressed the same way. I typically develop a list of questions that are important to the overall business operation along with giving the employee an opportunity to share more of their background to get to know them better.

This sometimes is not done internally because the new supervisor either has been working in the same group or they have had the ability to witness work within this group. *NOTE* - just because you have witnessed something or have worked in a different role within a work group does not mean that you

know the full extent of the situation. It is very important that a clean slate is brought into this dynamic. A sample Agenda would include:

- *Overview of experience*
- *Explanation of their job and their role within agency*
- *Goals for their division*
- *Positives and negatives of their position*
- *Explanation of day to day operations*
- *Knowledge of unique situations to help understand history*
- *Tour of worksite and/or facilities if possible*
- *General needs that are not being met*

Third – Schedule Expectations Meeting with Full Team

This meeting can be accomplished in a number of ways. You can meet with individual teams or with the organization as a whole. This will all depend on time and the number of employees that you have. I, suggest, however that no matter how large the organization, that you make the effort to reach everyone in the company in some fashion to introduce yourself and have them do the same. This message should be consistent with the Direct Reports' conversation.

Again, develop an agenda for this interaction to make sure you keep consistency. Potential format could look like this for this meeting:

- *Overview of your background and why you took the job*
- *Hold an abbreviated version of the previous expectation meetings done with Direct Reports*
- *Provide time for formal introductions by employees*
- *Learn names and positions – very, very critical!*

For each of these discussions always remember:

- Be Prepared
- Be Yourself
- Be Authentic
- Be Specific

TIP #2 Talk Less, Listen More!

The mastery of this can make or break a successful transition. Employees appreciate the ability to tell their story and also express their own reality. Give them the ability to do that. A lot of new managers have a tendency to think that their employees expect the new manager to have all the answers. Quite the opposite is my experience. The employees that are in the situation believe that they have the answers but are not getting to share them. They want to share. The best managers are those that listen, evaluate and listen some more before action is taken, specifically during a transition period.

I have seen where the transitioning manager has arbitrarily instituted new processes that went well for them at a previous location. The thought is that it will work for this particular set of issues as well but they didn't fully vet the options that might exist and the process failed. This type of action with little discovery can lead to inefficiencies and discontent among employees.

To be able to stay away from that type of mistake, LISTEN and EVALUATE – you will be glad you did!

TIP #3 Changes should be made slowly.

This is a potential HOLE that transitioning supervisors can make for themselves.

Transitioning supervisors must recognize that change is hard for most people but not for why most people think. Typically, people don't like change because they don't understand it and they don't understand how it might benefit them. That is why it is important to change slowly in these circumstances because it is hard to make changes without having developed a foundation of trust and communication. This does not mean, do not change, it just means do it slowly and give time for trust to develop.

Also, changes that are made should include the people that they affect.

I have read that 70% of all revolutionary change fails. It has usually been connected to the absence of a clear, thought-out process for change (Burke, 2011).

TIP #4 Negative thoughts on previous administrations should not be shared.

Well, this one should be a no brainer, but I see this regularly with new managers.

Usually when this occurs there is typically a lack of awareness of how this type of communication can negatively affect the organization or a miscalculation that this type of criticism can establish their leadership. Either one can destroy trust and develop strong negative feelings from employees that worked under the previous administration. This one is easily avoidable.

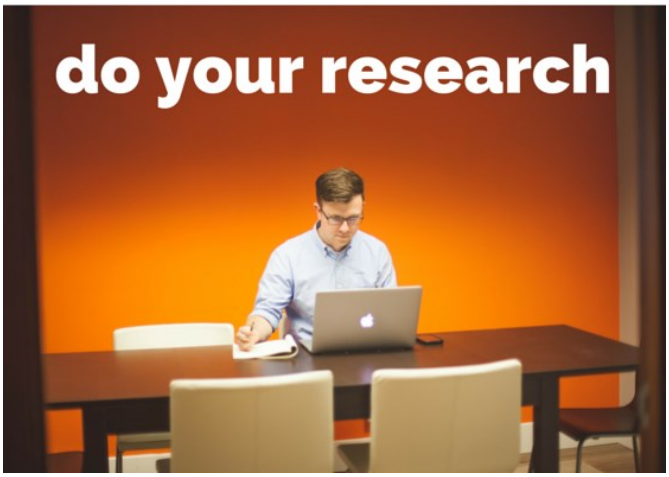
Remember everyone has had a previous administration and there are people within the agency that developed relationships and are still loyal to that relationship.

TIP #5 Recognition of the differences between perception and reality.

This one is tricky. It can happen when a manager is promoted within an agency and for sure when a manager is going into a new organization.

Let's talk first about an internal promotion. All of us in the workplace make assumptions about what people's roles are and how they are performing those roles, especially if we have the ability to witness that performance on some type of consistent level. The trap that occurs internally with this type of access is that we "think we know" but truly "Do we know?" I would advise all internal transitioning supervisors to realize that the purview that you may have had may not give you the information needed to make an informed decision and that bringing that into the new scenario would be a mistake. Employees want to be treated fairly and they want a manager that has the ability to gauge their work objectively. That having been said, they need to know that you are starting out with a clean slate. This is NOT easy but good managers practice this relentlessly.

Now, let's discuss an external move. I think almost always what is perceived to be the situation is never the exact situation. So, my advice is to be prepared for that. Do your homework up front on your new agency. Talk with people that you know that may know the agency intimately, make sure you ask the right questions of management to get the best feel of the organization and stay curious. When you apply for a job, typically in government, you look at the agency, the benefits, the salary and you do some homework on the town, city or county and determine then if you are interested in being a part of their team. Everyone's best foot is put forward during this process but be mindful that you don't know an agency truly until you are a part of it. Make sure, as best you can, that your values line up with the values of the organization. It is hard when the perception of an alliance initially appears to but actually does not.



Conclusion

Finally, in conclusion, it so important that you recognize the following when transitioning into a new role:

- *First Day Impressions Should Be Planned*
- *Initial Six Months is a Critical Time Period –Move Slowly*
- *Change is Difficult for Most People because the Benefit is not Understood or Communicated*
- *Understand Your Reality*
- *Listen and Evaluate!*

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