

CHANGE & TRANSITION CHECKLISTS

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"It isn't the changes that do you in, it's the transitions. Change is situational, transition is the psychological process people go through to come to terms with the new situation. Change is external, transition is internal." -- William Bridges

The William Bridges' change model contributed significantly to the consulting and leadership practice of managing change by identify three phases of transition, most notably starting with **endings**, a startlingly reasonable concept of embracing the grieving process that goes with letting go of former beliefs, practices, ownership as well as relationships. The remaining two stages, the **neutral zone** and new **beginnings**, have resonated with many leaders who know how difficult it is to beat the high odds of change progressing smoothly. Feelings and behaviors associated with denial or betrayal are common, especially if those affected by the change feel they had no choice or opportunity for participation in the change.

The stages are further characterized as follows:

Endings	Neutral Zone	Beginnings
<ul style="list-style-type: none">• Denial, characterized by disbelief and shock• May evolve from the initial shock into resentment• "It can't be. How could they do this?"• May fight to preserve the old system, or maneuver to hold on to the old.• May affect both positive and perceived negative change equally• Stress can be high	<ul style="list-style-type: none">• Disorientation• Beginning to let go• Discomfort when starting to let go of the old but not yet embracing the new• Confusion• Testing new behaviors, procedures, processes• Lack of focus• Withdrawal or self-pity• Allowing for venting	<ul style="list-style-type: none">• Letting come, new energy emerges• Initial, limited risk taking• Gaining some traction for new behaviors, procedures, processes• Beginning to feel included in the change• Forming an attachment to the new processes and systems• Beginning to see the possibilities and feel new excitement

A **checklist** for managing through the three phases includes:

ENDINGS

- ⇒ Identify who is likely to lose what with the change
- ⇒ Clarify why ending is necessary
- ⇒ Define clearly what is ending and what isn't
- ⇒ Mark the ending
- ⇒ Allow for resistance and grieving over the loss, in a variety of ways with differing timelines
- ⇒ Find ways to honor (not denigrate) the past
- ⇒ Allow people to take a piece of the past with them.

NEUTRAL ZONE

- ⇒ Acknowledge and normalize discomfort
- ⇒ Recognize that others may not be as understanding or as enthusiastic about the new beginning as you are.
- ⇒ Avoid giving “pep talks” before people are ready for them
- ⇒ If possible, protect staff from further changes or cluster the changes in a meaningful way.
- ⇒ If needed, create temporary roles, reporting relationships, and organizational structures.
- ⇒ Identify resources to help navigate this stage, such as facilitated meetings or special training programs
- ⇒ Encourage creative thinking and discussion
- ⇒ Provide an environment for staff to experiment and take risks, without having the fear of being punished for failures.

NEW BEGINNINGS

- ⇒ Create ways to involve staff in creating a strategies and action plans for each of the three phases of the transition process.
- ⇒ Work with staff to identify the part they will play in the new system, once the change has taken effect.
- ⇒ Ensure that policies, procedures, and priorities are consistent with the new beginning that is being created.
- ⇒ Build your own self-awareness of your actions to ensure you are effectively modeling the new attitudes and behaviors being asked of others.
- ⇒ Recognize staff for their contributions and quick wins in the new ways of doing business.
- ⇒ Celebrate signs and early wins during the new beginning.

Source: Adapted from William Bridges, *Managing Transitions: Making the Most of Change*, Da Capo Press (1991) p. 47-49

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