

## TOOL DESCRIPTION

# Personal Transition Checklist



**The Personal Transition Checklist provides an overview of things to keep in mind when helping individuals move through change processes.**

The leaders' role in change processes is not only to implement change in terms of introducing new processes, roles, rules and procedures. Their most important task is actually guiding others through the transitions that accompany change processes. Transition management, therefore, is a key part of managing people.

An important aspect to keep in mind is that change affects people very differently, and empathy is needed to approach this topic effectively. Changes involve endings, a neutral zone and new beginnings. Moving through these phases usually evokes different emotions:

- Endings: Feelings of loss, denial and higher emotional states.
- Neutral zone: Feelings ranging from those of anxiety, diminished competence and of being out of a personal comfort zone, but also those associated with learning and creativity.
- New beginnings: Feelings of acceptance, renewal, confidence, commitment and of 'fitting', that is, belonging here.

Different people find themselves in different stages (top management – middle management – lower level), and the pace of transition depends on the individual's biography. This transition needs time, trust and territory. In each of these stages, special attention has to be paid to specific aspects. In this description, we provide a checklist that leaders should keep in mind so that they can provide assistance during these personal transitions.

<b>Duration</b> ongoing during a change process	<b>Participants</b> unspecified	<b>Facilitation</b> no special material needed
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# Personal Transition Checklist | Template

ENDINGS	NEUTRAL ZONE	NEW BEGINNINGS
<input type="checkbox"/> Appreciate past achievements	<input type="checkbox"/> Communicate more often than usual; be present	<input type="checkbox"/> Refine the implementation
<input type="checkbox"/> Communicate what will stay the same and what will end	<input type="checkbox"/> Support the initial learning processes	<input type="checkbox"/> Create opportunities to try out new skills
<input type="checkbox"/> Clearly describe what will be lost	<input type="checkbox"/> Do not support quick fixes	<input type="checkbox"/> Concentrate on successes created by the new way of working
<input type="checkbox"/> Use symbols to set clear boundaries and make a clear break	<input type="checkbox"/> Create solutions that are applied for a limited time	<input type="checkbox"/> Celebrate successes
<input type="checkbox"/> Communicate the "Why" whenever possible	<input type="checkbox"/> Foster employees' creativity	
<input type="checkbox"/> Transparently communicate all activities		