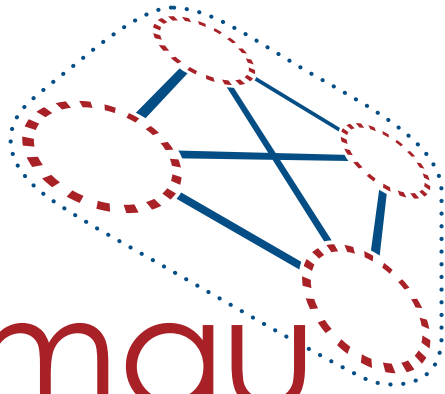


# My own transitions workbook

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**Dalmau**  
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# Introduction

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Whenever change is launched it must be led and managed. In an organization's project management processes change management planning is identified as good practice.

However, it is our experience, that change management results are disappointing because change management is not sufficient in itself; it needs to be supplemented by transition management.

## What is transition?

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Transition is **not** just another word for change. **Change** involves a shift in the external situation. It is about the events or circumstances of the organization. For example, the new leader, improved products or processes, different customers or newly merged organizations.

Change is typically outcome or results focused, in that organizational change is usually a solution to someone's perception of a problem or an opportunity. The changes are usually designed to align the organization with its strategic direction. Change can happen fairly quickly and has definite stop-start qualities. This paper<sup>1</sup> supports the companion papers on this topic **available on request**

**Transition** is an internal, three-phase psychological re-orientation that people go through as they come to terms with a change. It is a process, an inner experience not necessarily focused on outcome or results. It is timed differently from the external changes, and has less definition than the changes it accompanies.

This work book will help you work through your own transition as changes about you are done to you or you choose them yourself.

<sup>1</sup>. The material in this paper is built almost exclusively on the work of William Bridges, the acknowledged world leader on understanding and helping people through transition. We all owe him an incredible debt for the work he has done in this field. The particular material in this document has been drawn from other material written by Murray Outram, Dave Noble, Steve Zuieback and Julia Zimmerman.

A more complete description of these three phases can be found in the accompanying overview document entitled **“Transition - The Blindspot of Change Management”**.

## Figure out what is actually changing

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As soon as upper management announces that restructuring, new strategy, or launch of a new product line, you need to figure out how it changes your situation and your future. Be sure that you are seeing the current change in its broadest implications. Here are some examples:

A relatively minor layoff, though it doesn't directly affect you, may mark the end of the no-layoff policy you have always taken for granted.

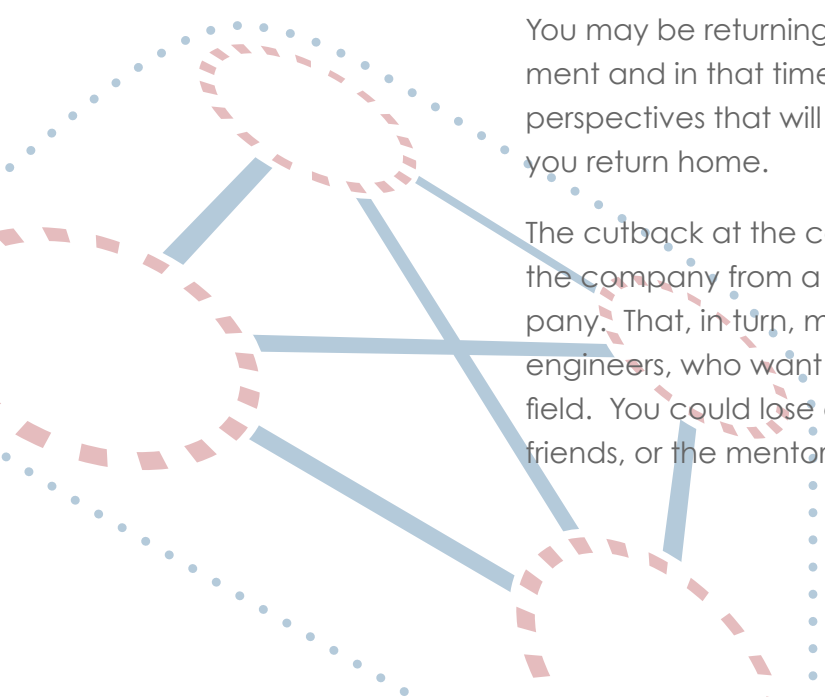
A new low-priced product line may represent a change in the company's emphasis on top quality and service, which was what made you proud to work for the company.

A new leader may have been appointed who is taking an activist and different mode of operating compared to the past. The power and influence you enjoyed before may be evaporating in front of you.

The closing of a regional office that used to stand between your district office and headquarters may leave you without support services you have always counted on. (The same closing may also flood your district with longer-tenured managers who are looking for a new position - like yours).

You may be returning from a long overseas sojourn or placement and in that time enjoyed experiences, ways of being or perspectives that will change significantly in some way when you return home.

The cutback at the company's research facility may change the company from a technological leader to a “me-too” company. That, in turn, may lead to an exodus of the most talented engineers, who want to be closer to the cutting edge of your field. You could lose critical talent from your team, or good friends, or the mentor who has been helping your career along.



The handsome new headquarters building you're moving into will put you under much closer supervision by your boss, who used to work on the other side of the city. It may also mean a new set of priorities, as money spent to buy an image replaces money spent on equipment and staff.

Transition can occur in any aspect of your life and these corporate examples simply relate to work: transition can be cast upon you from break ups, new experiences you actually choose yourself. You may be leaving a relationship. A partner may have died recently and you are starting on a new phase of life and experience.

You may have been retrenched or chosen retrenchment as an alternative to staying in a what for you would have been an unsatisfactory situation.

While you're looking at the big picture, tie it back to the details of everyday reality. Don't stop with generalities like, "I'll be busier" or "We'll have to phase out current operations." Get specific: "I won't have time to get any training this quarter" or "Our design team will probably be reassigned to a new project." "I won't have anyone to go to "x" with anymore – I will need to go alone". "I can no longer

Remember that changes have secondary and tertiary effects, so think about how your own situation could be changed by the indirect fallout from current events. You can't be sure about such things, for unforeseen events could change everything further. But to avoid looking ahead is to say "Forget about that truck heading our way. The driver may notice us in time to swerve."

## Decide what is really over for you

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What are you going to have to let go of? What's over for you - what are you likely to lose in the transition you face? Those may be hard questions to answer, not only because the effects of change are complex but also because you are likely to react with *denial* when you first face your losses. You're likely, that is, to find it difficult to see clearly and describe accurately the personal ending you face. Perhaps it will help to list some possibilities:

It could be a *dream* that has motivated you thus far in your life and career.

It could be an *assumption* about the rules by which you were playing.

It could be a *tacit understanding* about your value to the organisation or the value of the project you care so much about.

It could be the *belief* you have held about your boss or the head of your company - that he or she was ethical, for example, or concerned about his or her employees.

It could even be the *image* you have had of yourself - the faith you had in your competence, honesty, or organisational clout.

All of these losses, you will note, are internal ones: feelings, views, understandings, assumptions, self-images. Remember that change deals with the outer situation, whereas transition (and the loss that it triggers) is an internal matter. What you lose is part of yourself.

Loss hurts, so the best clue to loss is pain. What hurts you most in the current change? Spend some time letting yourself experience the feelings. (That may not be easy, for most of us learned to bury those feelings when we didn't know what to do with them). You may feel bad for somebody else, but push further and ask if the other person's situation means that you're going to have to let go of something yourself. Will you have to give up the idea that you can help your people when they need you? Or that you have to give up the illusion that the same couldn't happen to you? Or that you have to give up a hope of getting ahead while maintaining your self-image as a nice guy?

These are the things you need to mourn. That depression you've been feeling, punctuated with episodes of anger, may be the mourning process you're already undergoing. Recognise the signs of mourning in yourself - they are *denial, anger, bargaining, depression* and *acceptance*. These are not comfortable emotions to have, and you need to avoid acting them out thoughtlessly. Remember that you get to *acceptance* only by getting through the four preceding phases. You can't get around them, and suppressing them is simply going to undermine the letting-go process.

## Distinguish between current losses and old wounds

Feelings are feelings, and you have to accept them. But some feelings are reactions to the present and some are triggered by the ghosts of past losses that have never been properly dealt with. This relation between the present and unresolved issues from the past

is called “resonance” because the current issue activates the past one as one string on a piano or violin can set another vibrating.

When present situations resonate with painful experiences in the past, they cause far more pain than they otherwise would. Knowledge of this is sometimes all you need because it helps you to feel less frightened. It enables you to say, in effect, “The pain I’m feeling isn’t caused by the present situation. That situation isn’t as big a threat to me as it feels. It has just touched an old wound.” Remind yourself that *that was then, this is now*.

But sometimes even that isn’t enough when the pain (whatever its source) is too great. Your past makes you particularly vulnerable to certain kinds of losses in the present. Recognising the resonance in such a case is valuable because it makes clear that only by working on the old pain and finishing personal unfinished business will you get relief. That is the time most people seek professional help.

Your organisation’s employee assistance program (EAP) is a good place to start, or a coach, perhaps consider a pastoral counsellor or a psychotherapist. If you have friends who’ve had a good experience with professional help, ask their advice. Finding someone you’re comfortable talking with is more important than which licence he or she holds. Testimony from a satisfied customer is your best lead, in these matters as in most others.

## Identify your continuities

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But not everything is ending. A great deal - at work and in the rest of your life - is going to continue. Even in the most radical transitions, it is a piece of your life, not the whole, that is coming to an end. This is a time to take a personal inventory: take stock of the continuities in your life. List them on a piece of paper. Then think of things you’ve lost track of recently but that used to be a source of continuity in your life: old interests, old relationships, and former recreation you’d like to get back in your life. Add these to your list.

Now think about how to protect or restore these things, these parts of your life that are not threatened by your current losses. What can you do to enhance, strengthen, and reinforce them? Maybe you need to rethink how you’re currently spending your time - these continuities may not be getting the share they deserve. You may need to get in touch with someone again or return to a group you’ve lost touch with. Maybe you need to set clearer boundaries on your obli-

gations to others and create space to take care of your obligations to yourself.

## Design a learning venture

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In a time of transition, old knowledge is likely to be outmoded knowledge. You are facing challenges for which your upbringing and education did not prepare you. You are also changing. What used to interest you may not be so interesting these days. You have ideas or hunches that can't be explored without knowing things you don't know today. This isn't the sign that your education was deficient - only that both you and the world have changed and your knowledge and skills haven't yet caught up.

Do something about it. Call someone and ask a how-to question. Visit the local library and ask the reference librarian how to find information on an unfamiliar topic. Read a book on a subject you don't know much about. Talk to someone who knows how to do something you'd like to learn, or visit a place where you can watch things being done that you need to learn. Sign up for a course or training program in a new field.

A learning project may involve a formal program at an accredited university, but it need not. Too often people imagine that learning something new will require a great deal of effort and expense. Don't jump to that conclusion until you've explored the issue further. Such an assumption is likely to be one more way you tell yourself, "There's nothing I can do because I don't have the time and money to get totally retrained."

On the other hand, this may be exactly the right time to undertake a long-term educational effort. It doesn't have to lead to a degree, and it needn't be made up of course in the ordinary sense. It may be your own self-designed combination of reading, weekend extension courses, interviews, and visits. Instead of making excuses, find out what you need to know to explore a possibility or take a next step, and figure out the easiest way to learn it.

## Make a plan to change your life

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You know about planning - you do it all the time in your work. Establish your goal, then set objectives, then plan backward to identify the steps or stages you will need to move through to get from here

to there. You know that you have to identify the resources required and that you have to enlist people who can either help you or who might otherwise stand in your way. You've done this kind of "project planning" a hundred times. The only difference is that this time, you are the project.

## Even changes you want to make put you into transition

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There is a big difference: You have the normal human distaste for transition. You may love change, but losing your old identity and struggling through the wilderness without one is far from a Sunday stroll in the park. The problem of one's own transition undermines many otherwise wonderful plans to do new things in one's life.

You have read many ways to deal with your own transition. In a **companion workbook** we discussed how to help others with endings, neutral zones, and new beginnings, and many of those suggestions can be adapted to helping yourself. (For example, remember the Four P's: purpose, picture, plan, and part to play). Now is the time to apply all those tactics to your own situation.

## A checklist for you to work through

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Create a diary or special thinking pad and work through the following items. Review regularly your responses and add further thoughts and feelings, perspectives, insights and actions as they arise.

- Have I determined how my situation and my future have been changed by the recent, the current, or the planned organisational changes? What exactly is going to be different for me?
- What part of myself am I losing or am I likely to lose in the transition that is triggered by my change? Something that has been important to me is ending. What is it? What is it time for me to let go of?
- What losses in my life outside of work may be amplifying the feelings I'm getting from the endings that are taking place on the job?
- Can I identify signs of mourning in myself? If so, do I accept them as natural, or am I trying to get over it and move on quickly?
- Have I tried to separate my reaction to the present from the



resonance it may be setting off within me? And if the resonance is strong, have I sought professional counselling?

- Have I stopped and reflected on the continuities in my life (including those I've temporarily lost touch with) and done whatever I need to do to strengthen them?
- Am I recognising many of my feelings as the normal symptoms of life in the neutral zone, or am I imagining that they mean there is something personally wrong with me?
- Have I made the necessary temporary arrangements and agreements to give myself a temporary time-out from decisions and responsibilities that can wait?
- Have I found quiet times and stable places to give myself a respite from the chaos I so often feel around and within my these days?
- Have I set short-range objectives for myself to restore a sense of movement and achievement during this time?
- Have I taken the time to take stock of where I stand in my life now, both in relation to the goals I have set myself in the past and in terms of my own present dreams and needs, which might make other goals more rewarding to me?
- Am I actively trying to see myself with new eyes, especially in terms of what I desire, my abilities, my resources, and my basic temperament?
- Am I pushing myself to break out of my old ways of seeing my life and the options I have today?
- Am I asking *why*? And *why not*? When I look at how my life is at the moment? (And am I not accepting the ordinary, common-sense answers to those questions?)
- Am I letting myself play with outrageous possibilities, viewing them as paths that may lead to something workable in the long run?
- Am I thinking of analogies and metaphors for my situation. ("It's like a ...") and then trying to change them and come up with new ones?
- Have I pushed myself (preferably with others' help) to write down 15 or 20 different things I could do in my present situation?
- Am I committed to experimenting with my life this week?
- Have I designed a learning venture for myself, a way to acquire the knowledge and skills I need to deal successfully with my new opportunities?

- Do I have a “project plan” (as well-thought-out as I'd make for a work project) for what I'm going to do with my life and career at this point?
- Have I taken into account transitions that are likely to occur as I pursue that plan, and have I taken steps to manage them?

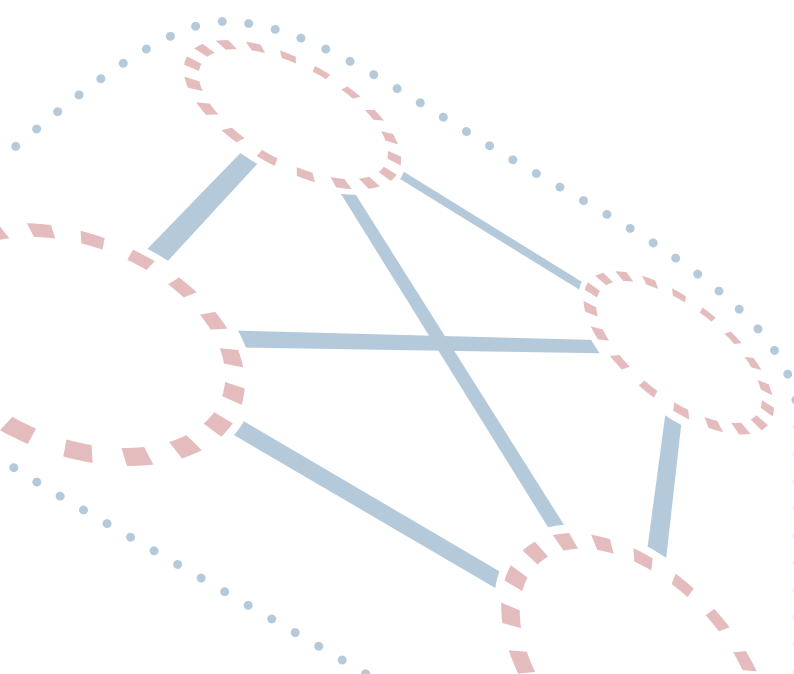
Finally, am I remembering the only four rules of living that I'm likely ever to need?

- Am I showing up?
- Am I being present?
- Am I telling the truth?
- Am I letting go of outcomes?

## Final question

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Reviewing everything I have written, what can I start on today, this week and this month?



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