

The Leader's Transition Management Checklist
 (Excerpt from *Managing Transitions* by William Bridges, Ph.D.)

Endings

Transition Considerations	Yes	No
1. Have I defined clearly what is over and what isn't?		
2. Have I permitted people to express their sense of loss? (i.e. Loss may include: identity, meaning, turf, control, structure and/or attachment.)		
3. Have I provided an opportunity to explore unresolved anger or hurt? If so, has there been a chance to "burn or bury" these past issues?		
4. Have I found ways to "mark the ending"?		
5. Am I being careful not to denigrate the past but, when possible, to find ways to honor it?		
6. Have I made a plan for giving people a piece of the past to take with them?		
7. Have I made it clear how the ending we are making is necessary?		

Neutral Zone

Transition Considerations	Yes	No
1. Have I created the temporary policies and procedures that we need to get us through the neutral zone?		
2. Have I set short-range goals and checkpoints?		
3. Have I found what special training programs we need to deal successfully with the neutral zone?		
4. Have I set up a transition monitoring team to keep realistic feedback flowing upward during the time in the neutral zone?		
5. Have I encouraged innovation and seen to it that people are not punished for failing in intelligent efforts that did not pan out?		
6. Am I using my time in the neutral zone as an opportunity to replace bucket brigades with integrated systems through the organization?		

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New Beginnings

Transition Considerations	Yes	No
1. Have I taken care of the ending(s) and the neutral zone, or am I trying to make a beginning happen before it possibly can?		
2. Have I clarified and communicated the purpose of (the idea behind) the change?		
3. Have I created an effective picture of the change and found ways to communicate it effectively?		
4. Have I ensured that everyone has a part to play in the transition management process and that they understand that part?		
5. Have I checked to see that policies, procedures, and priorities are consistent with the new beginning I am trying to make? Have I sent mixed messages?		
6. Am I watching my own actions carefully to be sure that I am effectively modeling the attitudes and behaviors I am asking others to develop?		
7. Have I built into my plans some occasions for quick success to help people rebuild their self-confidence and to build the image of the transition as successful?		
8. Have I found ways to celebrate the new beginning and the conclusion of the time of transition?		
9. Have I found ways to symbolize the new identity (organizational and personal) that is emerging from this period of transition?		
10. Have I given people a piece of the transition to keep as a reminder of the difficult and rewarding journey we all took together?		

Communicate Using The Four P's

1. **Picture:** Where are we going? (People need to experience it imaginatively before they can give their hearts to it.)
2. **Purpose:** Why are we going there? (People must understand the logic of the change before they turn their minds to work on it.)
3. **Plan:** How will we get there? (People need a clear idea of how they can get where they need to go.)
4. **Part:** What is my part to play? (People need a tangible way to contribute and participate.)