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Strategies for Successful Employee Transitions



Promoting from within rewards individual performance and sends a positive message across the organization that you value and recognize your employees' contributions. But such transitions – even lateral moves – can cause challenges and stress for both the individual and the team members around them.

When someone takes on a new role, particularly an advancement, there is a lot of uncertainty about relationships, roles and responsibilities, as well as team dynamics. Organizations should ensure that the appropriate leader is paying attention and taking steps to plan for a smooth transition. In preparation for an internal promotion, for example, the advancing employee can start taking on additional responsibilities, with care being taken, of course, that existing responsibilities continue to be met.

"Especially for employees moving into leadership roles for the first time, lower risk opportunities like facilitating a meeting or leading a project are a way for them to get their feet wet and begin to build confidence even before they're in their new position," says Jeannie Clinkenbeard, Director and Senior Consultant, FCCS' Accelerate Center.

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The employee can also seek out a mentor, with or without their manager's assistance. Their mentor should be someone other than their direct manager, and ideally, someone who has gone through a similar transition recently and can share their experiences, challenges and successes. The manager, themselves, can also offer constructive feedback and suggestions. Leadership development training is also effective in helping smooth a transition, especially programs that encompass personalized leadership blueprints that encompass their personally defined purpose as a leader, the promises they'll make and keep with their team, and their plan for achieving their leadership goals.

Whenever a new leader joins a team, whether it's an internal promotion or lateral move or a new hire, employees have understandable concerns about existing or changing processes, communication styles and expectations. They also may wonder whether their contributions are (or will be) valued and their skills truly recognized by the new leader, who may have previously been a colleague. The new leader can smooth their own transition by addressing these issues with their team up front and asking for any others they'd like to discuss, in both one-on-one and team meetings.

"It's often helpful to have a third-party facilitator, external or from HR, guide the initial group conversation between a new leader and their team to make sure the key issues are touched on and people feel a sense of clarity," says Michele Padilla, Director and Senior Consultant, FCCS' Accelerate Center. "And, even if they were part of the same team previously, every new leader needs to first build trust with their team members before asking for them to implement changes."

A team member transitioning out is a good time to review roles, responsibilities and job descriptions and consider making changes to accommodate specific skill sets and interests, or to incorporate better ways to collaborate.

In all transitions, the team managers should have a transition plan in place to ensure there is an adequate transfer of duties and responsibilities, and all job functions continue to be met in both impacted teams. New managers should keep in mind that transition and change take time and communicate this understanding to the team. It's also paramount that everyone involved in a transition share and manage their expectations appropriately.

The transition plan should include comprehensive communication about timelines and expectations for every stakeholder. Some of those expectations should include cross-training, procedure documentation and regular check-in points and team meetings to monitor the process. Administratively, there may be changes to benefits or other programs the employee may access.

"Having a transition plan brings stability to what could be chaotic and stressful time," says Jeannie. "Whether it's a promotion of a well-liked colleague or a departing manager no one will really miss, there's still often a void in communication, and uncertainty about what's coming next and how it will impact everyone left behind. One way to reduce uncertainty is for senior leadership to communicate with the team not only what may change, but also what will stay the same."

Any time an employee transitions to a new role within your organization, it's good to consider what training and development resources you can provide to help them excel. FCCS supports employee growth and development at every level:

Leadership Journey Programs through the FCCS Accelerate Center

- [Leading Self](#): for individual contributors and others interested in self-discovery.
- [Leading Others](#): for first-time and experienced line managers
- [Leading Leaders](#): for senior leaders of multiple teams or of functional areas

It typically takes six months for an employee to fully transition into a new role, during which time their manager should continue to check in to ensure the employee understands and is delivering on their responsibilities, has the tools and resources they need, and is acclimating to the new team and role.

For more information and insight into employee transitions or FCCS learning and development programs, contact [Jeannie Clinkenbeard](#) at 404.617.6917.