

The 3 Month (90 day) Transition Process



About This Resource



The Human Side of Workplace Transitions was written by Liz Weaver, a former co-CEO of the Tamarack Institute for Community Engagement. Over her 15 years at Tamarack, Liz experienced many transitions in roles and responsibilities, ending with a final transition to retirement.

Published in collaboration with the Tamarack Institute, this guide helps employees navigate the logistical and emotional challenges of workplace transitions, whether you are moving to a new role, switching companies, or retiring from the work world.

This section outlines the value of a structured 90-day transition process, particularly for senior leadership roles. A three-month period strikes a balance—long enough to provide thoughtful reflection and leave behind key documents for organizational continuity, but not so long that it invites unnecessary delays or added tasks. While pre- and post-transition planning remain essential for personal reflection and emotional navigation, the 90-day framework offers a practical timeline to manage organizational needs while supporting a smoother changeover.

The Three Month (90 day) Transition Process



The 90 day transition process provides leaders with the time to be fully reflective and provides the organization with key documents which are designed to support future leaders and continue to advance the work.

Senior-level executive positions (CEOs, Vice Presidents, Directors) often have a longer off ramp or transition process. The 90 day transition process is aimed at these senior-level positions. When I retired from Tamarack, I negotiated an 11 month transition with the board of directors. My reflections, once I had completed my transition period that an 11 month transition was too long. I did not feel rushed at the beginning and began to take on additional tasks. This led to a squeeze at the end when I had to finish some core tasks quickly and still navigate the transition process for myself and the organization.

A three month (90 day) transition process is a reasonable length of time to navigate the change. The 90 days is focused on the organizational transition process and does not include the individual's pre-transition and post transition planning. Pre- and post transition planning are important steps which can enhance your transition journey, give you reflective space and the time to navigate the emotions of transitions.



Resignation or Transition Letter

The resignation or transition letter is a tangible internal and external signal of change. Once a letter of resignation has been submitted to the organization or you have accepted a new role, the transition process effectively begins.

Engage in a conversation with your supervisor when you present your resignation letter. This is the opportunity to share your resignation plans, articulate your hopes for the transition process and the role you would like to play. It is also an opportunity to clarify and confirm the organization's expectations and commitments during the transition process.

In some situations, your resignation could be a surprise to your supervisor. Give them time to process the resignation letter and ask questions. There could also be times when your supervisor (or board member) is not happy with your news. They know that replacing you will take time and resources. They may even feel betrayed or hurt. You may have been the face of the organization and they will be worried about relationships with employees, clients, funders or external partners.

Your resignation letter should signal a rationale, if appropriate, and indicate your hope for a positive transition process. It is important to leave an organization in a positive way. The letter might also include proposed transition dates and information about your future plans, if they can be shared.

There are lessons that I learned during the process of submitting my resignation letter at Tamarack. Even though I had shared my intentions during performance interviews, the board of directors leadership had changed.

In leadership roles, it is good practice to have an annual and frank conversation about succession and succession planning. This process is healthy for both the individual and for the organization. This conversation provides both parties with an opportunity to reflect on their commitment, relationship and future plans.

I was also not proactive in negotiating the formal announcement but did contribute to developing a transition plan. In many ways, my experience, and the experience of others who have contributed to this resource, has shifted my thinking about the importance of being thoughtful and proactive during the transition process.

You and the organization may have different priorities that might conflict during the transition process and developing a transition plan can help to manage or mitigate the conflicts which might arise. Remember to schedule regular check ins with your supervisor or human resources to ensure that the co-designed and shared transition plan is moving forward successfully. There may be times where the transition plan will require clarification and adjustments.

The Formal Announcement

The formal announcements both within and external to the organization are pivotal points in the transition process. In many cases, you can ask to have input and a role in the public announcement and key messaging around your transition. Often there is a conversation about timing of the resignation or role shift and it is usually at this point that you can ask questions about the public announcement and what contributions you might make to the public announcement.

Consider how the public announcement will be shared and with whom. The public announcement will likely recognize your contributions and may inform members about the transition process. Some organizations may want to wait to share a formal announcement until a new person is hired. While the timing and content of the formal announcement is determined by the organization, if you have done pre-transition planning, you might be able to share what you consider as significant about your role or the contributions to the organization.

Another issue to consider if you are moving to another organization, is to align the announcements. You don't want the new employer announcing your hiring until your current employer does - it would be terrible for your colleagues to read about your new job before they know you are planning to leave. Also, the date of the transition is important.

People will want to reach out to you so setting dates, referring them to your LinkedIn profile to contact you may be a consideration as many people may only know how to reach you through your current email.

Human Resources & Finance Departments

Once you have shared your resignation letter with your supervisor, you might be referred to human resources and the finance departments within your organization. These departments may play a role in formally accepting the resignation and supporting you through the transition process. Some organizations will have a formal off-boarding or transition protocol, while others will have an informal process.

If your organization does not have an off-boarding protocol, there are online resources which can be accessed to develop and building a shared transition plan. You might want to share this list with your organization to support their off-boarding process.

The following items are typical examples of off-boarding checklists

- Agreement around last date of employment
- Agreement around process for accrued vacation or lieu days
- Notification of last date for accessing any work benefits programs
- Completion of termination paperwork
- Communication of the exit both internally and externally
- Completion of a handover document
- Collection of company assets
 - May include laptop and other computer equipment, phone, ID/Access Card, uniform, company credit card, company vehicle, other assets
- Information to employee about uploading or deleting computer files and programs (particularly useful for remote employees)
- Deletion of access to software programs
- Arrangement of final payments and benefits
- Completion of the exit interview
- Process for gratitude and acknowledgement of the departing employee

- Collection of updated contact information for the employee
- Process to check in with remaining team members
- Initiation of a recruitment process
- Updating internal documents including the organizational chart,
- Updating external documents including organizational website and other online documents

Weave into the three month (90 day) transition process any pre-transition planning and reflections which might be useful in your initial conversation with the Human Resources or Finance Department.

Agreement on building a transition plan

The final step in the announcement phase is to secure agreement on jointly building a transition plan. This shared agreement approach is helpful to individuals who are navigating the next three months (90 days). A solid transition plan can also be helpful to the organization. The organization will be able to articulate their needs and desires to help both parties ensure an effective and successful transition. The following sections support the building of shared transition plan.

Your Personal Transition Plan

Review your pre-transition reflection notes prior to completing the table below. Consider what you learned through the resignation and announcement process. Spend time completing the table below on your own. This exercise will be useful when you work with your organization to build a shared transition plan. In some cases, you may feel comfortable sharing all or parts of your personal transition plan document with your organization or your supervisor.

| Questions | For myself | For the Organization |
|---|------------|----------------------|
| Hopes: What hopes do I have for the transition that I am planning? | | |
| Fears: What fears do I have? For myself? For my current colleagues? For the organization? | | |
| Goals: What goals am I setting? For myself? For my organization? | | |
| Agreements: What agreements am I seeking? For myself? For the organization I am leaving. | | |

Self Care – What will you need to navigate this transition time

Transitions can be exciting and scary at the same time. It is also important to build in the practice of self care into your transition process.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions. You don't have to share these emotions with anyone but use them to acknowledge your current state and frame of mind.

The public announcement of your transition may generate an outpouring of good wishes and reflections from colleagues. Be sure to take time to reflect on, accept and celebrate this recognition for yourself and make time to acknowledge these good wishes from senders.

Acknowledging and being proactive about your emotions – both joyful and challenging – during the transition period is a way of building resilience and greater capacity to navigate the challenges ahead. This might be a time to connect back with trusted allies or to access external supports.

During transitions we experience mixed emotions including grief and loss but also hope and excitement. The pendulum between these emotions will swing frequently and focusing on self-care creates awareness and a sense of balance. For each month during the next three months (90 days), you will be prompted to capture your emotions and consider the following questions.

- What do you need personally to navigate this transition time?
- What impact will this transition have on personal and work relationships?
- Who should be included in conversations about your transition?
- What coaching or other resources or supports can you access through the transition process?
- How do you build in reflection time?
- How will you navigate the grief of leaving and the hope of new beginnings?
- What else do you need to consider to build a practice of self care?

| | |
|---|--|
| Today, I am feeling the following emotions about my transition process. | |
| This is what I will do to act on these feelings and emotions. | |

Organization expectations and transition planning

The next step in the first month (30 days) is to build a shared transition agreement between you and the organization. This transition agreement should include the following items:

- The hopes and fears expressed by each partner about the transition process
- The boundaries including time available to focus on the transition and time required to complete outstanding work
- A defined strategy for communicating the transition (internally and externally), transferring work and related experiences (including memberships on volunteer committees, etc.) and contact information from you to the organization
- Identified steps and check in points with key organization team members designed to keep the transition plan on track
- Any additional items that you and the organization agree are essential to ensure a successful transition

The table in the previous section can be used to build the framework of the shared transition plan.

Sharing the plan with the team & getting feedback

Once the transition plan has been developed and has the agreement of both parties, it might be useful to share the transition plan with other team members. Sharing the plan has benefits. Team members will know more about the transition process and what they might expect out of this process. Team members might identify gaps in the planning process. Team members might provide support and engage with their colleague through the transition process.

Sharing the plan may not work for every organization or work team. However, an open and transparent transition plan can contribute to team engagement and address some of the hopes and fears of team members as they prepare to lose a team member.

Building the transition agreement – organization and you

In addition to developing a personal transition plan, your supervisor or the organization could be invited to develop their version of a transition plan. In this version, the organization should consider the impact of the transition on the team and on the organization as a whole. In addition, they could be invited to consider how they will or can support the individuals who are leaving or taking on a new role within the organization.

Completing the table below will help the organization consider many of the aspects of the transition process.

| Questions | For the Organization | For the team member leaving |
|--|--|--|
| Hopes: What are our hopes for the transition process? | | |
| Fears: What fears does the organization have for the transition process? How will the team be impacted? | | |
| Goals: What goals should be set by the organizations to manage this transition? | | |
| Agreements: What agreements are non-negotiable? What agreements are negotiable? | <ul style="list-style-type: none"> · Confirm final date of employment · Agreement on vacation or lieu time accrued – how to manage this process · Document current work · Agree upon deadlines · Confirm internal meeting and team participation · Agree to an off-boarding process – Organization-led · Develop transition notes for replacement (if required) | <ul style="list-style-type: none"> · Confirm final date of employment · Agreement on vacation or lieu time accrued – how to manage this process · Document current work · Agree upon deadlines · Confirm internal meeting and team participation · Agree to an off-boarding process – Organization-led · Develop transition notes for replacement (if required) |

Reporting and relationships

The second month of the off-boarding, transition process will likely focus on documenting and transferring information. Depending on your length of time at the organization or in your current role, this process may take some time. How information is transferred should be included in the transition plan. Many organizations have a shared, online filing system which can accelerate the file transfer. However, you may want to review your files and ensure that private and personal information is deleted from the system.

Self Care – What will you need to navigate this transition time?

The excitement of announcing your transition has now passed. It is still important to check in with yourself and understand how you are feeling as you start your second 30 days.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions. You don't have to share these emotions with anyone but use them to acknowledge your current state. For each month during the 90 days, capture your emotions and consider the following questions.

| | |
|---|--|
| Today, I am feeling the following emotions about my transition process. | |
| This is what I will do to act on these feelings and emotions. | |

Follow up questions

- How have your emotions shifted?
- Who can you turn to for advice and support?
- What are you looking forward to as you progress through this stage of the transition?
- What are your fears?
- What strategies do you need to put into place to manage your fears?

Based on these reflections, it is useful to revisit and update your personal planning document.

Documenting current work – contacts, status, resources, internal transfer recommendations

Leaving the organization well should be the goal. This often means documenting current work in a way that can be used by colleagues to continue to advance projects and support organizational partners. There is a commitment to the organization and to partners that should be maintained.

Even if the transition that has negative impacts, downsizing and/or shifting priorities in the organization, there should still be a priority on leaving positively. This will help to maintain personal and work connections, ensure the sustainability of the work and the partners, and continue to support the organization post transition.

Items to include in documenting current work:

Assigned Work Projects

- Description, key partners, email or other contact information, current status as of (date), recommended next steps including who on the team might be able to maintain or complete the work project
- Agreed deadlines for completing projects or for the document of current work report

Anticipated Work Projects

- Description, key partners, email or other contact information, current status and information about timing and steps to advance the anticipated work project – this includes outstanding funding proposals, agreed services which have been scheduled, future meetings and partnerships in the early stage of development

External and internal committee support and leadership

- Description of the current status of the committee work, your contributions to the committee, recommendations for next steps

Personal Reflections about the Position and Organizations

- In preparation for the exit interview, take the time to consider and write down your personal reflections about the position and organization including positive opportunities encountered and challenges connected to the work

On-boarding document or package for replacement

- Include: work-related transition files, key contacts, and any recommendations which might support the replacement during their onboarding process
- Your role or potential in supporting or onboarding the person hired to replace you on the team (if a replacement is identified)

Internal team meetings – how and when to engage, when to step back

Agreement about participating in internal and team meeting should be part of the transition plan. The organization is immersed in planning for the departure including reviewing the position opening and planning forward. There may be opportunities to continue to engage in internal team meetings, but given the shifting priorities, there may also be opportunities to step back.

This is the time when transitions and all the emotions get real. You are no longer privy to decisions being made by the organization and you may note that they don't care as much about your files as you do. Especially if there is a new leader coming on who wants to do things their way. The second month is a pivot point for both you and the organization. It is full of emotions and later in this section, you will have the opportunity to reflect further on how your emotions are impacting you.

Stepping back will mean more intentional time to complete outstanding work projects and to document current work. It also begins the process of shifting focus toward the transition process. It can be complicated when you participate in workplace planning conversations. Your expertise might help to inform the conversation, but you will not be around for the execution of the plan. Speaking with your supervisor, human resources or your team in advance about your role in planning conversations is useful and can set appropriate boundaries.

The second month (30 days) is a natural time to step back from internal team meetings where you are not the leader. The conversation around engagement is important and should be considered based on personal preference, availability and contribution to team and organization.

Developing/completing the off-boarding document for the organization

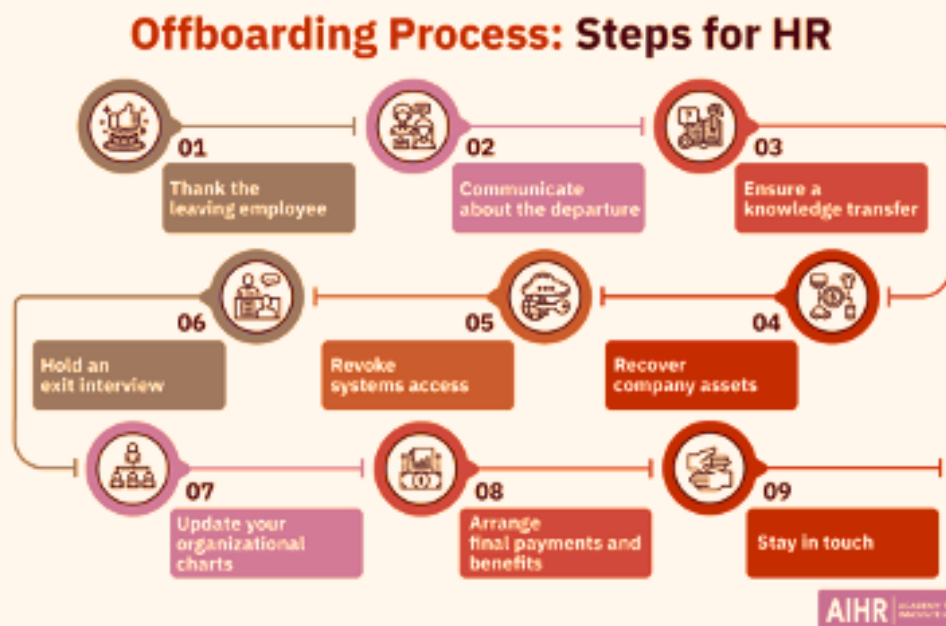
There are several examples of off-boarding or transition check lists which can be accessed online. Most off-boarding checklists have been developed to support the human resources department in the organization. All organizations should have an off-boarding document in place to ensure that both the individual experiencing the transition and the organization are able to manage the process effectively.

The Academy to Innovate HR provides a useful offboarding process for human resource managers. It contains nine steps for organizations to consider in the offboarding process. The AiHR suggest that the offboarding process completes the employee lifecycle and provides support to the

employee to leave the organization in a structured, positive, and coordinated way.

AiHR identifies that a strong offboarding approach matters and can lead to the following outcomes:

- Former employees can be ambassadors for the organization
- Former employees can become future employees
- Former employees are or can become customers or partners of the organization
- A strong offboarding process and maintain connections and organizational knowledge
- A strong offboarding process can enhance organizational security and minimize future threats, especially through a strong technology transfer process
- A strong offboarding process may be needed for compliance and regulatory requirements for certain industries



<https://www.aihr.com/blog/offboarding-checklist/>

Technology and offboarding

An increasingly important step in the offboarding process is uncoupling from the organization's technology that you have used to advance your work. Technology hardware and software is particularly challenging during a transition process. An information sheet and process for the employee about technology, uploading and deleting files to a shared information system, and deleting access to shared programs including finance and human resources programs is essential. This information sheet will ensure a more seamless transition.

An off-boarding checklist was provided. Review this checklist to make sure that you and the organization are making progress on the offboarding process.

Given the number of transition experienced by organizations, a transition checklist is an important and essential tool. A transparent offboarding process is an essential tool for both the organization and the employee.

Internal meetings to navigate the transition process

During this second month or 30 days of the transition process, several meetings should be organized and scheduled.

- Monthly meetings with your supervisor or human resources to review and revise your 90 day (3 month) off-boarding plan
- Meeting with your supervisor or human resource to review the off-boarding checklist
- Scheduling the exit interview with your supervisor or human resources
- Meeting with Supervisor and/or human resources to share and confirm work-related transition documents and files
- Meeting to confirm final transition requirements

Ensure that key meetings are on the calendar is an important part of the transition process. Your supervisor or the organization may already be moving forward and may not focus on these meetings. Be proactive. These key meetings will contribute to a smooth and mutually rewarding transition journey.

Self care – preparing for the final steps in the transition, letting go, and facing forward

This is a month of mixed emotions. Even though there is excitement about the next step, there might also be sadness about leaving an organization where you have made contributions and alliances. Again, it is important to consider your emotions and to build in self-care strategies as you transition through this final 30 days.

Write down the emotions that you are feeling right now about your transition process. Be as honest as you can be in expressing your emotions. You don't have to share these emotions with anyone but use them to acknowledge your current state. For each month during the 90 days, capture your emotions and consider the following questions.

| | |
|--|--|
| Today, I am feeling the following emotions about my transition | |
| This is what I will do to act on these feelings and emotions. | |

Follow up Questions

- How have your emotions shifted?
- Who can you turn to for advice and support?
- What are you looking forward to as you progress through this stage of the transition?
- What are your fears?
- What strategies can you put into place to manage your fears?

Prepping for and participating in the exit interview

Many organizations have formal exit interview processes. The exit interview provides the organization an opportunity to understand the reason for departure. An exit interview process does not have to be solely owned by the organization. You can use the exit interview process as an opportunity to reflect on and share your successes, employment highlights, and contributions to the organization. This shared reflection process is useful for both parties. The exit interview process should also include a review of the transition plan and confirm final transition documents and processes.

Consider who is doing the exit interview and what they might do with the information you share with them. For example, is it someone in Human Resources or your supervisor? Be prepared for what you want to say. How critical do you want to be? A recommendation for the exit interview is to always stay positive and forward looking.

Indeed, a recruitment website, identified the following questions to be included in an exit interview process.

1. What prompted you to begin searching for another opportunity?
2. Do you feel your manager gave you what you needed to succeed?
3. What did you like best and least about your job?
4. How do you think your job has changed since you were hired?
5. Did you feel your achievements were recognized throughout your employment?
6. What suggestions do you have for the company? How could we improve?
7. Is there anything that you would have changed your mind about leaving?
8. Would you recommend this company to a friend? Why or why not?

The exit interview is an opportunity for a two-way conversation. The organization is seeking, through the exit interview process, to improve the employment and employee retention experience. It is also an opportunity for you to share perspectives and contributions that have been made to the organization. This reflection process will support you through any post transition opportunities.

Acknowledging contributions & celebration of your work

The final 30 days will be an opportunity to acknowledge contributions and celebrate with internal and external partners. Consider how these acknowledgements and celebrations might happen and who might be involved. Be proactive and reach out to colleagues to thank them for their partnership during your time with the organization. Acknowledge how they have helped you or contributed to your success.

If you are reaching out to external colleagues, let the organization know. The organization may also have a relationship with external partners and colleagues and this can deepen or strengthen the relationship. The message should be positive and supportive of the organization and the journey that you have been on together.

It is especially important to share who the external partner may contact once you are gone. It is helpful to have this in place. You may also want to discuss with your organization how you will share your personal contact information - in many cases that might just be a referral to your LinkedIn profile.

Connecting and thanking team members, key allies, contacts, collaborators, volunteers

Gratitude is the gift that you can give others. Our work requires us showing up as a whole person which includes our strengths, weaknesses, and emotions. Team members, allies, and collaborators have helped you be successful and have contributed to your employment journey.

The practice of gratitude also has benefits to you as well. For example, it offers colleagues an opportunity to share the impact you have had on them and reflect on the valuable work you have done together. This may offer you further insights and reflections about yourself and your accomplishments that you may not have considered.

Take the time to connect and thank individuals who have provided support while employed at the organization. Make a list of names and think about the specific contribution of each individual. Personalizing your gratitude will make it more meaningful and will provide you with an opportunity to deepen and strengthen the relationship and connection.

We often fail to acknowledge that our personal success is tied to the encouragement and support of others. Spending time considering who and how you are grateful, will be affirming and enriching.

Technology and tools transfer

Most employees have access to a range of organizational technology tools. This may require you to upgrade your own personal technology. Organizations and employers will protect themselves by ending the access to technology hardware and software once the individual has completed their time with the organization. This is a risk management and confidentiality strategy for both the organization and the individual. However, uncoupling from software programs can be challenging.

During the final month (30 days), build a shared approach with the organization around technology transfer including the following:

- Confirm end date where you have access to technology – hardware and software
- Add work-related files to a shared or cloud-based platform
- Confirm to whom and how you transfer technology to the organization
- Establish a personal external contact email which you might want to share with colleagues and partners
- Change emails and passwords to work/personal organizations where appropriate – this might include travel services, work related newsletters that you want to continue to receive, etc.

Remember that you are navigating your way through this transition and many of these may not be relevant in your new role. You can ensure that you have access and then unsubscribe later or get more critical what you will actually have time to review newsletter subscriptions, etc. especially if it is adjacent to your new role.

Facing forward

While the final 30 days in this 90 day (three months) transition is often spent reflecting and considering your contributions, it is also a time to begin to face forward. Some of you will have had a more negative transition process that has left you feeling alone and isolated. Others are looking forward to their new role in another organization, retirement or a sabbatical. In all cases, facing forward and turning toward the new is essential.

Here are some final steps to complete the 90-day (three months) transition and enable the ability to face forward.

Complete the transition plan: A completed transition plan will ensure that there are no obligations which keep you tied to the organization. This completed plan will also support the organization and your colleagues to move forward in an effective way. Make sure you hand your completed transition plan to either your supervisor or human resources in the organization and celebrate this accomplishment.

Revisit your hopes and expectations for the future: Over the past 90 days self care and reflection have been essential elements in the transition process. Revisit the hopes and expectation that you wrote down. How have these shifted and changed? What else might you add to this list? Where might you seek supports?

Engage in self care and reflection: The 90 day transition process has likely been a mix of reflection, planning, documentation and emotions. Fear and curiosity are two emotions that seem to be at the polar opposite sides of the journey. And yet, fear and curiosity can take us toward anticipation and the future. Take the time for self-care throughout this transition journey. For example, you might want to consider ways in which you might honour or recognize this transition for yourself in some meaningful way. You are not alone; there are colleagues in your network who are on similar journeys or trusted allies who will support you and be there for counsel and advice. In the course of writing this resource, I connected with over 20 colleagues who have shared their insights and comments to this document and invite their comments. In each conversation, they shared thoughts about their own transition journeys and the benefits that come from reflecting on and sharing them with others. In our circle are colleagues who recently completed a transition journey or are in process. These colleagues can be your confidants, supporters and cheerleaders.

Final Thoughts & Reflections

This resource emerged from my reflections about my recent transition from the Co-CEO of Tamarack, where I had worked for fifteen years. It has also been shaped by the input and insights of many individuals who have also recently navigated their own employment transition process or are currently in one of the stages of employment transition. I am grateful to them for their suggestions, enthusiasm, and for their contributions. The conversations we had have affirmed that this is a resource that is both timely and helpful.

While each employment transition journey is unique, they all share common patterns that highlight opportunities to maximize opportunities and minimize the challenges that often emerge during these times, and can be navigated more effectively with the benefit of can be more effectively navigated with thoughtful reflection and planning. The intention of this resource is to provide you with tools, approaches, and resources that will help to make the employment transition journey easier and increase the likelihood that it will offer better outcomes for both employees and organizations alike.

Workplace transitions require courage and honesty as you navigate some of the more challenging reflection questions. Transitions are often uncomfortable because they require that we navigate the space between what is known about our current employment role and what is unknown and untested in our future. This resource offers a roadmap to guide your transition journey in ways that builds resilience by offering practical suggestions designed to help us to manage the current and be proactive about the future while ensuring that our employment transitions occur on the best possible terms.

The exercises and questions which invite reflection on your unique contributions and skills are important for both the organization you are leaving and for you as they help to inform and clarify your future ambitions. The intentional focus on self-reflection, combined with connecting to trusted allies supports you to navigate the grief and loss you might feel during the employment transition process.

I learned many lessons during my employment transition as a senior leader at Tamarack. I anticipated, and was also surprised by, how difficult it was to manage my emotions at times. It has also left me with a deeper appreciation that emotions are real and a natural part of the process. I had trusted allies that I turned to who helped me think through what I was feeling and provided sound advice and direction. Employment transitions can be challenging and difficult, but they also provide us with a time to reflect, renew and re-engage.

I wish you well on your transition journey. Let me know what you liked or what you might change about this resource. Your employment transition experience will help others in their journey.

Liz Weaver

Are you involved in a workplace transition? Are you seeking additional support and guidance?

Over the past several years, I have provided coaching services and supports to individuals navigating their workplace transition journey. Connect with me to discuss your transition, by emailing me at lizcweaver@outlook.com. We will discuss your workplace transition and develop a solution and path that is personal and customized.

Gratitude and Acknowledgement

The following individuals contributed to the development of this resource. I am grateful for their wisdom.

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Additional Transition Resources

There are many online resources designed to support individuals through a transition process. Below is a selection of resources that might be helpful to your transition journey.

On-boarding Resources:

- Indeed: [New Hire Onboarding Checklist](#)
- Harvard Business Review: [A Guide to Onboarding New Hires \(For First Time Managers\)](#)
- SHRM: New Hire Integration: [Start Here when Onboarding a New Employee](#)
- RUNN – [The first 90 days – Summary and Tips for \(New\) Leaders](#)

Off-boarding Resources:

- Bamboo HR: [3 Offboarding Best Practices every HR Expert should Know for 2025](#)
- Academy to Innovate HR: [Offboarding Employees: A nine-step process](#)
- ADP: [Offboarding](#)

Reflection Questions Resources:

- Harvard University: [10 Coaching Questions that Work in any Conversation](#)
- Bite Size Learning: [101 coaching questions to ask your team members](#)
- On Strategy: [Leading Questions: 10 examples and 5 powerful benefits](#)

Navigating Emotions Resources:

- LinkedIn: [A Compassionate Guide to Navigating your Emotions, Especially during darker days](#)
- Calm: [The Feelings Wheel: Unlock the power of your emotions](#)

Managing Change Resources:

- Harvard Business Review: [Managing yourself: 5 ways to bungle a job change](#)
- Indeed: [7 steps for how to decide whether to change jobs](#)
- Better Up: [7 things to consider when changing jobs](#)

Executive Transition Resources:

- Bridgespan: [Nonprofit CEO Transitions Resource Centre](#)
- Harvard Business Review: [Learn to get better at Transitions](#)
- Stanford Social Innovation Review: [The Five Stages of Founder Transitions](#)
- Stanford Social Innovation Review: [Making Founder Succession Work](#)