

# Post Transition



# 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 highlights the value of post-transition reflection to carry forward learning, recognize achievements, and prioritize self-care. By focusing on what feels within your control, you can make the experience empowering and positive for both you and your organization. Since every transition is unique, the tools and questions provided can be adapted to support your journey and help you “leave well.”**

# Post Transition Reflection & Planning

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The post-transition phase is designed to support you to move forward proactively. It focuses on how you can use what you learned about yourself during the 90 day, three week transition or termination processes. Spending time reflecting on your contributions, achievements, and on self-care are essential for your future growth and employment journey.

Both the pre- and post-transition processes include useful questions, resources and tools designed to help you move through the entire process. These questions are designed to identify and understand your locus of control, and what you might be able to influence during the transition process.

Two underlying reflection questions during any type of transition are:

- What about this transition is making me feel powerless?
- What about this transition process can make me feel powerful?

Because transitions, both positive and negative, are emotional, it's important to intentionally build in time for self-care and reflection. Proactively focus on what you can do to ensure that the transition process and experience is positive for you and the organization or role that you are leaving. The intention of this resource is to leave well and to ensure the transition experience is positive.

Several reviewers of this resource found it helpful to jump back and forth and between sections. It gave them additional information and additional reflection time. Each transition journey is unique. You can use and adapt the resource to suit your unique needs and experience.

## Section 6: Post Transition – Developing and deepening new habits

*Congratulations*, you made it through your transition process. Unfortunately, it is not yet completed. This final stage, post transition, is an opportunity to deepen the new practices and habits you built both in the pre-transition and during your transition journey. Those accessing this resource will have different transition experiences. Some of you are starting new jobs with another organization or changing a role in your current organization, some are taking a break from your existing organization and planning a return in the future, some of you have been let go from the organization and others are entering retirement and a transition from the work world. In each of these cases, these transition experiences are real and most certainly varied.

A gift that any transition offers, regardless of the circumstances that led to it, is that it disrupts your typical day-to-day routine, creates a natural time and space for self-reflection, and opens up an opportunity to reaffirm, clarify or transform your current career and life path.

Planning for the post transition experience is meaningful. Engaging in a thoughtful and designed approach will help you navigate the stages post transition. This section provides advice and suggestions for the next three months (90 days) following the completion of your transition process. It is designed to help you leverage the learning and insights you have gained into an ongoing practice. Even if a transition is not one of your own choosing, it still offers the gift of an opportunity to pause and take stock.



## Reflection Questions

The post-transition process starts with a reflection session. Identifying the personal, belonging, work and transition implications that have been part of the reflection process will help with the planning and implementation post-transition.

From a personal perspective, consider what you learned about yourself and your ability to navigate your emotions during the previous 90 days. How did your emotions shift through out the past 90 days and how did you navigated these changes? How are you feeling right now? How are you viewing transitions differently now?

A lack of belonging and identity are real for individuals transitioning from one role to another. Reflect on the elements of belonging and identity that you experienced in your formal role. What made you feel like you belonged? What contributed to your sense of self and agency? How might you look for and create these in this next phase of you? What practical steps can you take to build a sense of belonging and identity? If you have been in a role or at an organization for a long time, it may be difficult to distinguish and fully appreciate how your personal identity, achievements and capabilities and reputation align with – and/or are distinct from – that of the organization.

Consider the transition process as a whole. Write down the elements that worked well and consider what might be improved? What blind spots did you encounter and how did you navigate them? What might you do in future transitions.

We experience significant changes and transitions frequently. Reflecting about the transition process will build your resilience and confidence in effectively navigating future transitions, both those that impact you directly and those t where you are playing the role of a partner, a colleague or a trusted ally.

## Self Care – Navigating Fear and Building Agency

This resource is designed to support you, the individual navigating the transition process. Throughout the resource, the practice of self-care is prominent. In the post-transition phase, engaging in self-care is equally important. While there are different types of transitions, each transition process should include the practice of self care as you navigate a range of diverse emotions.

Take the time to consider each emotion and add more to the list. What are you feeling right now? Consider what actions might be taken to navigate this emotion at this time. What have you discovered about what you need to support yourself well during transitions? In some cases, reaching out to a friend, colleague, or trusted ally will help uncover next steps and possible solutions.

The practice of self-care includes activities that nurture our physical, mental, emotional and spiritual well being. Self-care is about creating and maintaining a healthy and balanced life and might include activities like exercise, spending time with friends and family, engaging in hobbies and quality sleep. It may also include opportunities for self-reflection as well as the intentional recognition of your transition journey in some meaningful way. Self-care requires being intentional as about creating greater balance by identifying and managing physical, social, mental, spiritual and emotional elements. It is the conscious act of increasing capacity for resilience and navigating the transition process.

Emotion	What I am feeling right now	Actions required to navigate this emotion
Fear		
Identity		
Belonging		
Grief		
Self-Doubt		
Agency		

## Consulting trusted allies

Trusted allies are important during all stages of the transition journey. Reaching out to trusted allies can help you to identify blind spots and they can provide perspectives that you may not have considered. At each stage of the transition process, you might reach out to different allies. In the post transition phase, you might look to those allies who could provide employment coaching and contacts.

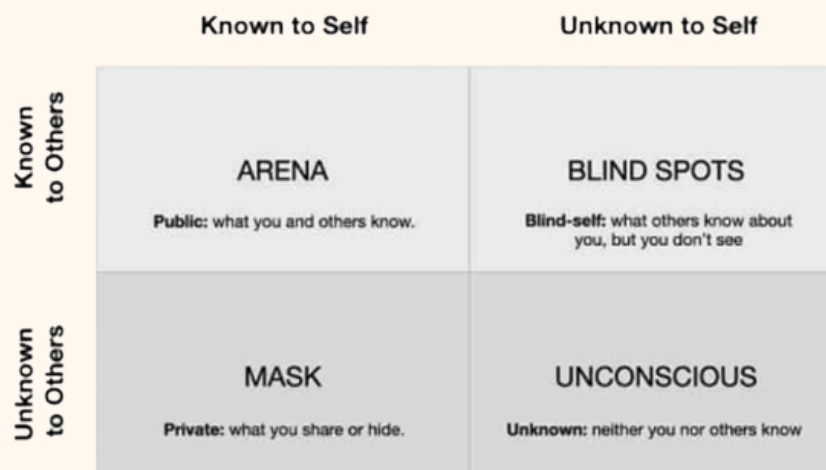
Consider:

- Who are trusted allies that I can connect with during the post-transition phase?
  - Write down the names of 5 people you will contact as a trusted ally
- What support am I seeking?
  - Write down the specific support you are seeking.
- What questions do I want to ask them?
  - Write down 4 to 5 questions that will inform the conversation

- How do I open myself up to their advice?
  - Take notes during the call or meeting both about the advice
  - Note your reaction to the advice
  - Write down actionable next steps
  - Send a thank you note to your trusted ally

The Johari Window is a useful approach when consulting trusted allies. It is a framework to improve your self-awareness of your conscious and unconscious biases. The Johari Window is divided into four quadrants: the open area (things you know about yourself), the blind area (things you don't know about yourself, but others do), the hidden area (things you know about yourself but keep hidden) and the unknown area (things that are unknown to you and to others). The Johari Window can be used to build connection and trust, increase self-awareness and understand what others know and don't know about you. Using the Johari Window can provide insights and practical next steps in the post-transition process.

## Conquer Your Blind Spots—Johari Window Model



## Building your personal future plan

Connecting with trusted allies is just one step in the post-transition, facing forward process. Taking the time to develop and build a future plan will provide actionable next steps for you.

Part of the building of a personal plan for your future should include the revisiting of the transition plan document. Consider what worked during the transition plan and what changes would have enhanced the outcomes. Also take note of the insights and clarity that you gained from the process and what, if any, lessons you want to bring forward into your next role(s). Build your reflections into the post-transition plan document.

As you move through the next few months, re-visit your post transition plan frequently, update, and adjust as needed. Transitions occur more frequently than we imagine, documenting the process of transition, will ensure that you are prepared for the next transition that comes along. You will play a proactive and engaged role, leading to more positive outcomes.



## Build your Forward Facing 90 day (three month) workplan

Month	Forward Facing Actions
First 30 days post transition	<ul style="list-style-type: none"> <li>· Review and rebuild your personal transition plan</li> <li>· Reflect on the transition process just completed – what worked, what would you change</li> <li>· Self care – what do you need now and where can you find support</li> <li>· Building a list of trusted allies, questions, and connections</li> <li>· Set 30 day goals for you future forward plan               <ul style="list-style-type: none"> <li>o What goals do you have for the first 30 days?</li> <li>o What goals do you have for the second 30 days?</li> <li>o What goals do you have for the third 30 days?</li> </ul> </li> </ul>
Second 30 days post transition	<ul style="list-style-type: none"> <li>· Review first 30 days – what worked, what might you improve?</li> <li>· Self-care</li> <li>· Connecting with trusted allies</li> <li>· Goals for the second 30 days</li> </ul>
Final 30 days post transition	<ul style="list-style-type: none"> <li>· Review second 30 days – what worked, what might you improve?</li> <li>· Self-care</li> <li>· Connecting with trusted allies</li> <li>· Goals for the final 30 days</li> <li>· Building your next 90 day workplan (if required)</li> <li>· Keep the transition resources you have build in an accessible spot to refer to them during future transitions</li> </ul>

Your first 30 days in a new management role:  
How to start strong by Maryam Taheri provides useful advice and 8 specific steps for new leaders to follow as they build toward success in their new role.

1. Listen first, speak second
2. Know the business, not just your team
3. Build personal trust – not just professional authority
4. Look for small, targeted wins
5. Align early with your manager
6. Share your values and be explicit about your expectations
  - a. Decision-Making (consensus, consultation, or a closed/direct?)
  - b. Communication (Slack, email, meetings?)
  - c. Feedback (how often, how direct?)
  - d. Priorities (what is non-negotiable?)
7. Build psychological safety
  - a. Admitting what you do not know
  - b. Owning your mistakes
  - c. Asking for input and actually using it
8. Create and share a 30-60-90 day plan
  - a. First 30 days – observe, listen, make sense of the system
  - b. 60 days – make conscious changes, clarify team objectives, develop connections
  - c. 90 days – propose and lead some shifts, change processes, improve performance

Additionally, Taheri provides suggestions on what not to do when beginning a new position. These include not jumping in to fix problems too quickly, not micromanaging or over compensating, and not engaging in difficult conversations. She also suggests engaging in the human side of the organization by learning the culture of the new organization, working collaboratively and not treating the experience like the job you have just left.

*So, begin to lead intentionally. Choose clarity over charisma, depth over speed. Drain the need for control and cultivate credibility. You are not to prove you have all the answers but demonstrate that you will arrive at the best answers with your team (not above them).*

# Final Thoughts & Reflections

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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.

It does 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](mailto:lizcweaver@outlook.com). We will discuss your workplace transition and develop a solution and path that is personal and customized.

## **Gratitude and Acknowledgement**

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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](#)