New Manager Transition Process

**Time Required:** 5 hours over a period of 1 month

**Goal**
- Accelerate the relationship building between a manager and his/her new team.

**Process**

- **Manager Meeting 1** (30 minutes)
  - Review transition process.
  - Discuss manager questions.

- **Staff Meeting** (60-90 minutes)
  - Explain transition process.
  - Discuss staff questions.
  - Transcribe staff input to written document.

- **Manager Meeting 2** (60 minutes)
  - Share staff input and confirm understanding.
  - Prepare responses to staff questions.

- **Team Meeting** (60-90 minutes)
  - Manager shares data gained from staff meeting.
  - Manager seeks clarification as needed.
  - Manager responds to questions from staff.
  - Manager and staff establish action items to address challenges.

- **Manager Meeting 3** (30 minutes)
  - Discuss challenges and identify support needed.
  - Discuss transition and action plan items to determine impact of process.

**Note:** Optional staff meeting can be held as well to explore their thoughts about the transition.
New Manager Transition Process (Cont.)

Preparation

New Manager Transition Process – Manager Preparation

Instructions to the Manager: Complete the questions below and prepare to share your answers with your team.

1. What I already know about this team is…
2. What I don’t know but would like to know about this team is…
3. What they need to know about me as a manager is…
4. The major challenges we will face as a team in the next year are…
5. Some specific ideas I have for managing those challenges are…
6. Other questions or concerns I would like to discuss are…

New Manager Transition Process – Staff Preparation

Instructions to the Staff: Complete the questions below and prepare to share your answers in a facilitated meeting. Your manager will not be in this meeting.

1. What we already know about our new manager is…
2. What we don’t know but would like to know about our new manager is…
3. What our new manager needs to know about us as a team is…
4. What we most want/need from our new manager is…
5. The major challenges we will face as a team in the next year are…
6. Some specific ideas we have for managing those challenges are…
7. Other questions or concerns we would like to discuss are…