

How to make a big transition and maintain your cool

Darla Cameron (@darlacameron)
Alyson Hurt (@alykat)

Notes » bit.ly/srccon-transitions

Let's talk about transitional moments.

Shared notes:

Major life changes, like marriage or family health

Parental or family leave

FMLA/extended medical leave

Coming back from a sabbatical or fellowship

Book leave

Coming to a conference

Taking a new job

Taking on a temporary assignment at work

Going from internship to full-time job

Organization doubles in size

Moves from international reporting to reporting in the U.S.

Shift to remote work (or shifts back to in-person work)

Internal team reorg/restructuring

Changing managers

Layoffs

Team attrition

Change in company ownership

Office moves/remodels (change of physical space)

Company reorganization

Unionization

New software/systems — changes to how you technically do your job

Deprecation of software you rely on

New internal policies (like new hiring practices)

Significant strategy shift (team- and company-level)

Job description changes

Taking on new responsibilities

Rebranding (for example, consolidating verticals and relaunching your company's site)

One year later, realize you've been doing a different job for awhile
> realizing change happened later. Not a specific change

General notes:

Donut slack channel- picks to people at random to make you talk to each other

Technical roles always lagging one behind- In job A, start actually doing job B, switch companies to do job B, but you're really doing job C. Even if title says X, in reality it could be something else

Important to have tracks for growth for contributors and not just managers

Empathy for your colleague's transitions is so important

Documenting is your friend- if something bad is happening, write down the date and time that bad incident happened. But it's also good for good situations, write down good things that you did!

Roles We'll Discuss

The Newbie 🧒

YOU are starting a new job (or are coming back from leave, or taking on a new role, etc.)

The Skipper 🚤

You're on a **TEAM**. Someone new is starting, or someone is returning from an extended absence, or someone is taking on a totally new role. (Skipper as in captain, not as in "one who skips")

Peace Out, Dude 🙋

Before **YOU** start a new job, you have to leave your old one.

Left Behind 😭

A member of your **TEAM** is leaving.

The Newbie 🧒

YOU are starting a new job (or are coming back from leave, etc.).

- What's the best goal to set in your first day, week and month?
- What's the ideal way to introduce (or re-introduce) yourself to your manager and best enable them to help you meet your career goals?
- How do you get yourself up to speed?

Shared notes:

Listening tours -- meeting people who will recommend others to meet

Easier to get people to talk to you

Get a sense of power, influencers

What do you want to do the first week vs. later on?

"Information sponge" at the beginning, more of a contributor later

Make a contribution as soon as possible — boost confidence

Establish your track record, lower anxieties

Write goals for yourself in the role

Can start with the job description

Ask for feedback! How am I doing?

Read all of the documentation. Can help you ask better questions and develop relationships

An opportunity to rewrite / improve the documentation

You can ask "why"

Work-life balance

Assess the culture

Book: “The First Ninety Days” — create a learning plan and assess the situation you’re coming into

The Skipper

You're on a **TEAM**. Someone new is starting, someone is returning from an extended absence, or someone is taking on a totally new role.

- How do you support them, the team and the team's mission?
- What is your onboarding process?
- What's the best way to communicate (and maybe help your new colleague disrupt) institutional context?
- Who can they approach with questions?

Shared notes:

Onboarding things to remember to tell people about

Have an organized checklist

Development perspective- introductory task to make sure their permissions and configuration are correct

Written guides on style and practices- "here is how we do things"

Assign someone to be the guide- person to ask questions

15 minute rule- if you're stuck, be stuck for no more than 15 minutes, and then ask someone- don't waste a day on a problem

Put meetings on someone's calendar as soon as they get there- set up those coffees as the onboarder. Facilitate the discussions

What are cultural norms? Ex, business people like to use email, and other teams like to use slack. So that's why you won't reach them on either platform.

Easy and small projects- assign it to them

18F has a slackbot called Mrs. Landingham(?) named after character on the West Wing- helpful reminders in real time, ex, 3 weeks after you start, sign up for your 401k, etc.

Don't treat new people like it's just their job to learn, but be open to the processes and things they know that could change the team for the better.

Have the new person get through the checklist on their own so they can learn to navigate the company

Meet all the teams and hear directly from the source what they do and what they want to be doing. Different perspectives.

Introduce unofficial practices- we have a birthday calendar or a free food slack channel or a cute animal channel!

These practices make all teams generally healthier

Remote employees- find moments to have informal conversations and check ins. So they don't feel alone!

Create a board game meeting or unconference knowledge sharing. If you expect that to happen before a regular meeting it doesn't play out that way

Peace Out, Dude 🖐️

Before **YOU** start a new job, you have to leave your old one.

- How do you define what you do and your role in the organization?
- How do you do the handoff?
- How do you support your teammates who will be taking on your work?
- What do you know that no one else on the team knows, or no one else on the team knows as well?

Shared notes:

Document not only the things that are written down in your job description, but also informal/unofficial things that you do

- Interfacing with other teams
- “Gap-filler” tasks - the glue between other, formal processes

A “role” document — your job — vs. project document

- Role = more general
- Project = more specific

This is the stuff that you do all the time

This is the stuff that comes up occasionally (but may not happen during overlap)

What are the terms for contacting you in the future after you leave?

- Is it a pay situation?
- Can only be contacted by a few people

Supporting teammates

- What can i do for you before i go?

Relationships with others in the organization

- Connect teammates with other folks who have been good collaborators
- Who do you go to for certain things?

Thank you notes? Take the time to express appreciation for important folks in your professional life. Keep those relationships open.

- They might not always know that something they're doing is really helpful

Union jobs: Sometimes the job is *just* the things in the job description. Your replacement may not do the extra stuff you used to do.

Sometimes a project/thing just has to die

Left Behind 🥲

A member of your **TEAM** is leaving.

- How do you figure out what they know and how this will impact the team?
- How do you redistribute the work?
- How do you redistribute the institutional knowledge?
- What ongoing practices can help prevent departures from being a crippling blow?
- Work aside, is there a way to define/maintain team culture?

Shared notes:

On structure of teams:

When someone leaves or joins, you're forming a new team. The Ship of Theseus or the Grandfather's Axe — no, this is a new thing. It's like [the dog packs](#) in that one Vernor Vinge novel, *A Fire Upon The Deep*.

Book: [The Alliance](#), where you sign up for tours of duty.

Employment where you have a goal and when you're done, you're done.

When manager comes/leaves, all the managers sit down and reestablish the boundaries and roles of each team.

Documentation can be written based on what people ask questions about, so the docs solve the question. Just-in-time documentation delivery, using Slackbot responses as docs. Convert docs from question responses. Docs written in small

pieces, easily consumable, not in 60-page chunks. Docs written using Twine (twinery.org) for scavenger hunts. Mrs. Landingham bot at 18F.

How to capture team culture:

- Note who does things, to see what they do for the team.

- Figure out why it's scary for one person to leave. If the team's culture is built upon one person, that may mean that the rest of the team wasn't really contributing to the team culture.

- Who buys the birthday cards and cakes, who maintains the birthday calendar?

- Document memes and in-jokes.

- Have the people who are staying write down what the person who is leaving does, to make sure their replacement does most of those things and that the rest are redistributed

- Pick the few essential/necessary things of the departing person's role, and hire to fulfill that, rather than matching that role. Figure out what the things were that they did because they're really good at it instead of because it was their role.

- Hire someone based on what they'll be doing, not based on what qualifications they need. But that requires a good hiring process.

This (RIGHT NOW) is
a transitional moment.