



Tomorrow's Doctors, Tomorrow's Cures®

Transitioning to a New Role: Practical Tips on Navigating From One Chapter to the Next

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GWIMS Toolkit

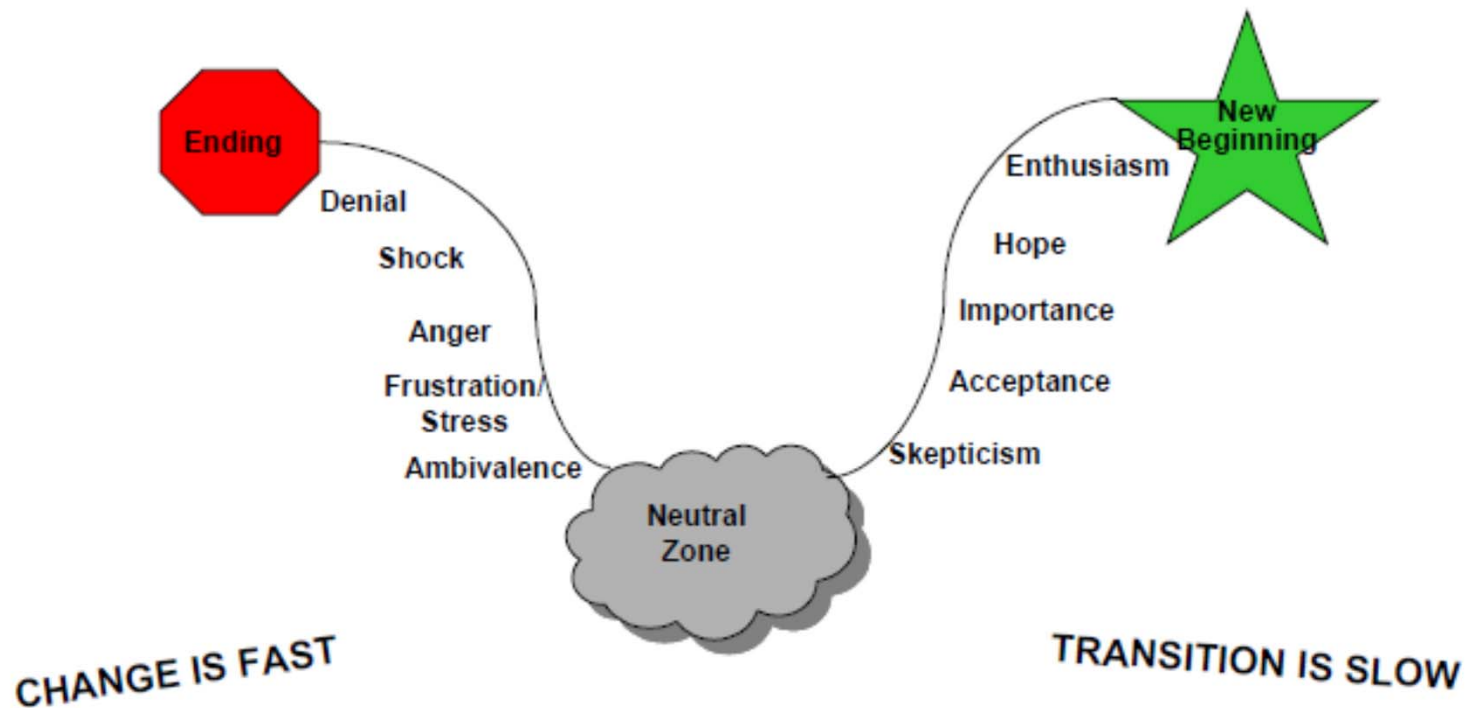
"Not in His Goals but in His Transitions man is great" - Emerson



Background

Change vs. Transition – Change is Easy, Transition Hurts!

- **Change** is situational and happens without people transitioning
- **Transition** is psychological and is a 3 phase process where people gradually accept the details of the new situation and the changes that come with it



From "Managing Transitions" by William Bridges. Available at http://www.moravian.org/wp-content/uploads/2013/06/Bridges_Transition_Model.pdf

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Why People Change Roles

- 1) Get recruited/asked to take on new role
- 2) Figure it is time to change

How many of you:

- Have Transitioned Recently?
- May Transition in the Near Future?



Who Stays and Who Leaves?

Respondent Characteristic	YES	NO	UNSURE
Plan to retire in the next 1–2 years	3%	91%	7%
Plan to leave this medical school in the next 1–2 years	10%	71%	19%
Plan to retire, leave the medical school, or leave academic medicine in the next 1–2 years	13%	67%	20%

Select AAMC Faculty Forward data from 2011

Factors that predict Intent to Leave

- Nature of work - 83%
- Collegiality + Collaboration - 72%
- Relationship with supervisor - 70%
- Focus on medical school mission - 67%
- Workplace Culture - 67%
- Faculty Recruitment + Retention - 63%
- Compensation + Benefits - 62%
- Medical school governance - 45%

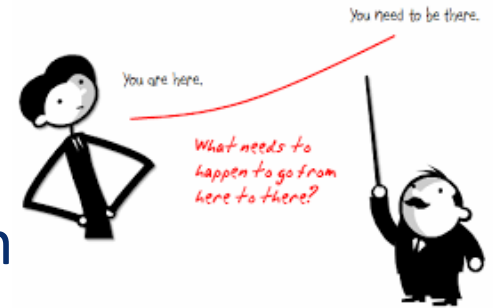
Select AAMC Faculty Forward data from 2011

*Items in red font are designed to draw the attendee's attention to them

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Objectives



- 1) Identify **need/opportunity** for transition
- 2) Prioritize **tasks associated with leaving** a position and institution
- 3) Describe strategies to **enhance knowledge of the new organization** and **establish priorities**
- 4) Establish **goals to be accomplished early**
- 5) **Avoid common pitfalls**
- 6) Describe methods of **building new collaborative relationships and effective teams**

OBJECTIVE #1

Identifying Need/Opportunity



Opportunity

Strategies to Identify Need/Opportunity

Where are the “Hot Jobs”?



- Are you happy in your current position?
 - If not, look for opportunities – Within Institution vs. External
- Engage your network
- Let trusted people know you may be willing to transition to a new position/role
- When asked to serve in a new role – SAY YES (If it is the right fit for you)!
- Connect with search firms
 - Typically hired by organizations to fill leadership positions
 - Some specialize in placing leaders in academic medicine
 - Helpful in identifying the right position for you and preparing you for interviews

OBJECTIVE #2

Prioritizing Tasks



Leaving Gracefully (and with Integrity)

- 1) Create a Transition Plan
- 2) Make a TO DO list
 - 1) Professional
 - 2) Personal
- 3) Develop a Time Table (and stick to it!)
- 4) **Announce departure/new position**
- 5) Activate succession plan/delegate duties



1) What to Include in a Transition Plan

- Offer to write/modify a job description
- Offer to help recruit/suggest successor
- Prepare staff/colleagues
- Offer to provide training/support for replacement
 - Create list of responsibilities
 - Index paper/electronic files
 - Share “insider tips”



2) Things to include on a TO DO List

- **Professional**

- Apply for medical licensure/credentialing
- Arrange to transfer grants
- Meet with HR – Benefits, vacation, etc.
- Complete/hand off projects/charts, etc.
- Clear up files – paper/electronic
- Allow time to pack/organize office, lab., etc.



2) Things to include on a TO DO List (cont.)

- **Personal**

- Prepare/Engage your family/friends – this often plays a large role in women’s decision to transition
- Arrange for school, bank transfers, mail forwarding, etc.
- Allow time to pack/organize
- Schedule a vacation
- Allow time to reflect on past, plan for future



3) & 4) Timetable/Communications

- Develop a realistic timetable
- Allow for “cushion”
- **Create/deliver/rehearse notification of resignation/ transition**
- Meet key stakeholders
- Notify patients/collaborators/friends/relatives
- Prepare/deliver “farewell” message
 - Emphasize the positive
 - Thank everyone (not a time to vent/gloat!)
 - Bid goodbye



5) Succession Plan/Delegation

- **Allow sufficient time for transition**
- Clarify work expectations during transition
- Be flexible on timelines
- Keep end date in mind
- Suggest appropriate successor
- Mentor successor if possible
- Offer future support (with realistic expectations)

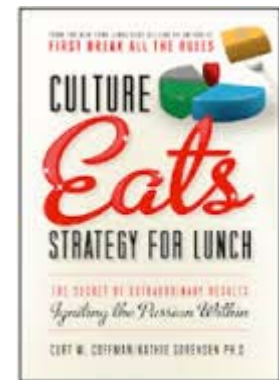


OBJECTIVE #3

Learning the New Culture



What is "culture" and how do I learn it?



Definition of “Culture”
The behaviors and beliefs
characteristic of a particular group

OR

“How we do things around here” –
Dr. Kevin Grigsby

Knowledge of New Organization

- **Learn Organizational Culture** – websites, publications/reports, key stakeholders, discussion with colleagues, utilize Linked In profiles to search for networks
- Situation Analysis - Understand Mission, Org. Chart, history and traditions, decision-making process
- Start “listening tour”
- Discuss with predecessor/interim person – issues, priorities
- Conduct stakeholder interviews
- Engage a Mentor/Coach
- **Connect with Admin staff** – Schedule “Unscheduled” Time



OBJECTIVE #4

Establishing Priorities/ Goals

Goals



Establishing Priorities/Goals

- Priorities
 - Yours – “A” items
 - Your boss’s – urgent vs. longer-term
 - Others’



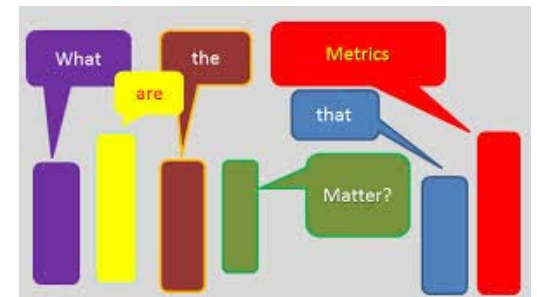
- Develop “Milestones”

- First week
- First month
- First quarter
- First year

“Low-hanging Fruit”

Establishing Priorities/Goals (cont.)

- Analyze own strengths, weaknesses, learning style – take time to pause, question, reflect
- Build Personal Credibility/Trust – Define strategic intent, **connect with people**, “early wins”
- Demonstrate Authenticity – create transparency, show loyalty, confront reality, keep commitments
- **Delineate Outcomes/Metrics for Success** – clarify expectations, practice accountability
- Articulate Vision and Goals - Be a change agent (**respectfully**)
- **Create the role, don't just fill it!**



OBJECTIVE #5

Avoiding Common Pitfalls



Common Pitfalls

- Overpromising/Underdelivering – “Human beings are overconfidence machines” – David Brooks, NY Times
- “Selective” listening
- Falling out of alignment with leadership
- Trying to orchestrate change without support
- Being inflexible
- **Poor communication**
- Underestimating resources needed to accomplish goals



Common Pitfalls (cont.)

- Failure to understand/adapt to organizational culture
- Failure to establish strategic priorities
- Inadequate “face time” – with peers, subordinates, boss
- Hubris - Arriving with “the answer”
- Over-reliance on old strategies
- Tyranny of the “Urgent”
- Conspiracy of Interruptions
- **Failure to build team**



Strategies for Avoiding Common Pitfalls

- Enlist trusted observer
- **Keep vision in sight** – plan for demands of new job, esp. time
- Continuously self-assess
- Let go of the past
- Hit the ground running
- “See” yourself in new role
- Relearn how to learn
- Rework your network – go to “them”
- Do not over-rely on strengths
- Watch out for “underminers”



OBJECTIVE #6

Building New Relationships and Teams



See “Strategies for Cultivating Career Satisfaction and Success through Negotiation” available at <https://www.aamc.org/download/439462/data/toolkit-negotiations.pdf>

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Building Relationships and Teams

- Assemble/solidify team
- **Assess your “team”**
 - ? Right mix of skills
 - ? Right team dynamic
 - ? Right organizational support
- Keep “good” people
- May need to restructure – tough early calls
- **Foster collaboration**
- **Create supporting alliances and coalitions**
- May need formal team-building exercises/consultant

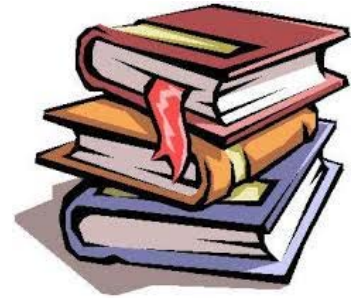


“Takeaways”



- Transition **NOT** the same as change
- Preparing to leave takes time and planning
- Learning ASAP/AMAP about new position critical to success
- What worked before may not work again
- **Communication is key**
- A thoughtful approach will help prevent pitfalls
- Team-building is vital and takes time and energy

Additional Resources



- Watkins, MD. Picking the right transition strategy. Harvard Business Review, 2007.
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- Goldsmith, M. What Got You Here Won't Get You There: How Successful People Become Even More Successful, 2008.
- Ciampa D, Watkins M. Right From The Start: Taking Charge In A New Leadership Role, 2005.
- Katzenbach JR and Smith DK. The wisdom of teams.
- Lencioni P. The five dysfunctions of a team.

Additional Resources

- Bickel J. Deciphering the organizational culture and developing political savvy. *Academic Physician & Scientist*, 2005.
- Morahan P. Traversing career changes gracefully. *Academic Physician & Scientist*, 2002.
- Grigsby K. Five ways to fail as a new leader in academic medicine. *Academic Physician & Scientist*, 2010.
- <http://www.kornferryinstitute.com>
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Resources

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Dr. Chatterjee is Professor and Chair of the Department of Pediatrics and Senior Associate Dean for Faculty Development at the University of South Dakota Sanford School of Medicine, Sioux Falls, SD. She has previously served as the Associate Dean for Academic and Faculty Affairs and Chief of the Division of Pediatric Infectious Diseases at Creighton University School of Medicine in Omaha, NE.

Dr. Chatterjee has been elected/selected to serve on several national Advisory Boards and Committees including the US Food and Drug Administration's Anti-Infective Drugs Advisory Committee, the Steering Committee of the Association of American Medical Colleges (AAMC) Group on Faculty Affairs, the Publication Committee of the Infectious Diseases Society of America (IDSA), and is currently serving on the Steering Committee of the AAMC Group on Women in Medicine and Science, the Clinical Affairs Committee and the Programs & Meetings Committee of the Pediatric Infectious Diseases Society (PIDS), and also as the PIDS liaison to IDSA's Standards and Practice Guidelines Committee (SPGC), as well as vice-chair for the Bone and Joint Infections Guideline Committee for PIDS/IDSA.

Dr. Chatterjee has published over 50 peer-reviewed articles, 25 invited review articles, 18 book chapters and one book. She serves as a reviewer for 30 journals. In the past 15 years, Dr. Chatterjee has delivered over 450 lectures and 110 scientific presentations at various international, national, regional and local venues



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She has successfully mentored undergraduate students, medical students, residents, fellows and junior faculty. She has served as the Dean for Faculty Affairs and Faculty Development at the Stony Brook School of Medicine and is the current Russell J. Eilers, MD., Endowed Chair of the Department of Pathology and Laboratory Medicine and a Professor of Pathology at the University Of Kansas School Of Medicine.



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