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THE **WELSH NHS** CONFEDERATION  
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# Review

Managing Transitions *by William Bridges*



## About Review

*Review* is a new publication for Welsh NHS Confederation members that aims to provide a literature review of key texts and ideas in health and related fields written by leading edge thinkers from around the world.

### Introduction

A “must-read” text for anyone involved in managing staff during major organisational change is *Managing Transitions* by William Bridges.

Bridges, a business consultant and world-renowned authority on change and managing change, offers well-tested, effective tactics to make change more comfortable for everyone.

Bridges’ main aim is to help managers understand the difficulties they face when they try to get people to change the way they do things – what he describes as the “foot dragging and subtle sabotage” – and how they can overcome it.

There is a traditional view of a manager as the person who tells people what to do and they do it – but simple, unquestioning compliance happens less and less often.

Bridges’ key point is the importance of making the subtle, but crucial, distinction between change and transition.

Change is situational: the new boss, new teams, new roles, but transition is the psychological process staff must go through to come to terms with the change.

It’s the psychological aspect that’s difficult to manage, not the physical programme of planned activity, such as creating a new IT system or moving offices. It is only after psychological transition that people adapt to the new organisational culture and adopt new ways of working.

As Bridges argues, “it isn’t the changes that do you in, it’s the transitions”.

Bridges splits up the stages of transition into three steps:

1. Ending, losing, letting go
2. The neutral zone
3. The new beginning

### How to manage endings

Psychological transition starts with an ending – letting go of the old reality. In any organisational change, staff may fear, whether rightly or wrongly, that they stand to lose something from the “old way”, e.g. established career paths, organisational identities,

working patterns. Staff must be allowed to come to terms with their own personal “endings”.

It does little good to talk about how healthy the outcome of change will be. Instead, you have to deal directly with the losses and endings. People will have to let go of a whole world to make the new arrangements work.

Bridges offers advice on how to help staff to “let go”:

1. Identify who’s losing what. What is going to be different when the dust settles? Who is going to have to let go of something? Their peer group, roles that gave them a sense of competence, chances for promotion.
2. Accept the reality and importance of their losses. Don’t argue with what you hear. You’ll make your task more difficult by convincing people you don’t understand them, or don’t care. You need people’s commitment and you won’t get it unless you understand them.
3. Don’t be surprised at “over-reaction”. Being reasonable is only easy if you have nothing at stake. In many cases, over-reaction is normal and not really an over-reaction at all.
4. Acknowledge the losses openly and sympathetically. Managers are sometimes loathe to talk openly, thinking it may stir-up trouble. But it’s not talking about a loss that stirs up trouble, it’s pretending that it doesn’t exist.
5. Expect and accept the sings of grieving. It is a natural reaction to feel anger, anxiety, sadness, disorientation. Allow people to get through these emotions.
6. Compensate for the losses. Can you give something back to balance what’s been taken away? e.g. control, status. Give them new feelings of competence with new responsibilities or timely training.
7. Give people information and do it again and again. Information is often withheld because leaders are afraid to give it. Define what’s over and what isn’t.
8. Treat the past with respect. Must sell the old way as wrong, but the trick is making the distinction non-judgemental. Honour the past for what it has accomplished. Let people take a piece of the old way with them.

There are lots of rationalisations for not communicating change fully to staff. Some common ones may sound very familiar to those working in the NHS:

- *They don't need to know yet. We'll tell them when the time comes.* For every week of upset that you avoid by hiding the truth, you gain a month of bitterness and mistrust. Besides, the grapevine will already have the news anyway.
- *They already know. We announced it.* Threatening information is absorbed remarkably slowly. Say it again, and in as many different ways as possible.
- *I've told middle management, it's their job to tell their staff.* Middle management is likely to be in transition itself. Don't assume that information trickles down the organisational structure in a reliable and timely fashion.
- *We don't know the details ourselves so there's no point in saying anything until everything has been decided.* In the meantime, people will get much more frightened and resentful. Much better to say what you do know, say that you don't know more and explain what kind of schedule exists for additional information.

The biggest reason organisational changes fail is that no one thought about endings and how to manage their impact on people. The first task of transition management is not to understand the destination and how to get there, it's to convince people to leave home in the first place.

Once you understand you must begin with letting go, the second step is to manage the neutral zone.

### Managing "the neutral zone"

Once staff have understood and come to terms with the loss of the old way, they enter a "neutral zone": when the old way has gone, but the new way doesn't feel comfortable yet. It is a difficult time - anxiety rises, motivation fails, people are disoriented and teamwork can suffer.

Managing the neutral zone is essential. It is the only way to ensure the organisation comes through change in tact.

Bridges gives tips on how to manage the neutral zone successfully:

- Try to protect people from unrelated and unexpected changes. If you can't, try and cluster them in a meaningful way. People can deal with a lot of change if it is part of a larger whole.
- Make sure that policies and procedures are adequate to deal with the confusing fluidity of the neutral zone. e.g. do you need a new policy on job descriptions, time off for training, who can make what kind of decisions? What new roles and responsibilities do you need to get people through? e.g. acting managers

Bridges urges managers not to be discouraged during this difficult period, explaining that the neutral zone is the best chance for creativity and renewal. The gap between the old and new is when innovation is most possible – it's the time when old habits are extinguished and new ones take their place.

NHS managers can take advantage of this opportunity by fostering a spirit of entrepreneurship. That spirit is totally alien to the "do what you're told" mood that can characterise some organisations, but an entrepreneurial outlook is the surest antidote to becoming frightened by change. In an organisation that punishes failure, you aren't going to get this kind of effort.

Establish, by word and example, that this is time to take stock, to question the "usual". Schedule time outs, policy reviews, surveys, suggestion campaigns.

Throughout the tricky journey through the neutral zone, a significant change takes place: staff go through an inner "sorting" process, while they get used to the new way and prepare themselves for the next step: launching a new beginning.

### Launching a new beginning

Beginnings cannot be made to happen by word or act. They happen when the timing of the transition process allows them to happen.

To make a new beginning, Bridges advises leaders to think along the lines of the four Ps: purpose, picture, plan and part to play.

#### Clarify and communicate the purpose

Leaders need to explain the purpose behind the new beginning clearly, answering the question "why are we doing this?" People may not have an idea of where the organisation stood and what its problems were. In that case, you need to sell problems before you try to sell solutions, if this wasn't done in the "ending phase".

There is always a purpose behind a change, though sometimes you will need to adapt the idea to the interests and understandings of your audience. Be specific. The purpose will not be discernable if it has not been clearly explained in terms that mean something to you. Don't use clichés or vague ideas such as "improved efficiency" or "we're going for excellence". Successful new beginnings are based on a clear and appropriate purpose. Without one, there may be lots of starts, but no real beginnings.

#### After a purpose, a picture

Purposes can be abstract – they are ideas and people aren't prepared to throw themselves into a difficult and risky undertaking simply on the basis of an idea. They need something they can see, at least in their imaginations.

What is the outcome going to look and feel like? What are people going to experience that will be different? Visual aids

help – floorplans of new office layouts, a map of the area served by new organisations.

### Create a plan

Not the plan for the changes - the physical activity that needs to happen for the change to take effect (e.g. move to new offices), but the plan for the transition. The transition plan is much more person-oriented and maps out when people will receive the information, training and support they will need to make the transition.

### A part to play

Even the best-laid plans leave troubling doubt in the minds of some people. No one has told them how they fit into things. People need to see their role and their relationship to others in the new scheme of things. Until they know, they can't begin to adjust to the new reality.

### What do you do when staff are unhappy with the change?

Bridges describes a list of common actions leaders take to get staff to adopt new behaviours. He splits each action into five different categories, starting with the ones least likely to achieve success:

#### No! Don't do this!

- Turn the whole thing over to the employees and ask them to come up with a plan – involvement is fine but has to be carefully planned. Simply to turn power over to people who don't want a change to happen is to invite catastrophe.
- Break change into smaller changes. One change after another is trouble. Better to introduce changes in one coherent package.
- Tell them to stop dragging their feet. Don't make threats – they build ill-will faster than generate positive results.

#### Not very important. Maybe even a waste of effort.

- Explain changes in carefully written memo or e-mail. E-mail is a poor way of conveying complex information. Written information is usually used to protect the sender rather than inform the reader: when you put things in writing, people can't complain that they weren't told.

#### Yes and no. Depends on how it's done

- Appoint a change manager responsible for seeing that the changes go smoothly. This works if it has been well-planned with proper communication, training and support. If the person is simply employed as an enforcer, it will weaken the change effort.

- Training seminars. It's important to train staff, but it can be wasted if it's not part of a larger, comprehensive effort.

#### Worth doing but takes more time. Start planning.

- Reward compliance with the changes and stop rewarding the old behaviour.
- Design temporary systems to contain confusion during crossover.

#### Very important. Do this at once.

- Figure out how individuals' behaviour and attitudes have to change to make the new way work. What must they stop doing and what must they start doing?
- Analyse who stands to lose something. It's the process of letting go that people resist, not the change. You have to understand the loss to deal with the resistance.
- Sell the problem that is the reason for change. Most managers put 10% of their energy into selling the problem and 90% selling the solution to the problem, forgetting that people aren't interested in solutions to problems they don't see.
- Talk to individuals, ask what problems they have. Managers often say they know what is wrong but the truth is they often don't. They imagine that everyone sees things as they do.
- Talk about transition and what it does to people. Never pretend that change is easy.
- Hold regular team meetings.

As an underlying principle, Bridges urges leaders to adopt tactics that don't merely change the situation, but help people make the psychological reorientation.

#### How to deal with non-stop change

With many changes occurring at once, it is important to analyse the changes and try to discover an underlying common purpose e.g. the need to save money, or to speed up processes. Is there a larger pattern that rationalises all the changes? Bridges compares this to joining the dots in a children's puzzle and discovering the hidden picture.

He advises managers to bear three key points in mind when dealing with a near constant state of flux:

- Rebuild trust: When people trust their manager, they're likely to undertake a change even if it scares them. When they don't feel that trust, progress isn't likely to occur. The technique is simple – simple to explain anyway: start being trustworthy. Do what you'll say you'll do, be honest. The single key to the building of trust: tell the truth.

- Unload old baggage: During change, old grievances can resurface from previous mismanaged transition. Every transition is an opportunity to heal old wounds. It is never too late to become an organisation that manages its people well.
- Keep selling problems – it makes people readier for change in general.

## Conclusion

In the midst of the upheaval caused by major change, it may be difficult for managers to find time to get involved with the psychology, the personal side of change management.

But with so much change in the NHS, many managers may find themselves dealing with the aftermath of mismanaged or unmanaged reorganisations from the past. It creates resentment, anxiety, self-absorption and stress. These are the costs of not managing transition effectively – something to bear in mind if there is temptation not to worry about staff reaction to the latest plan for change. It's a shortcut that costs much more than it saves.

With difficult challenges ahead, the NHS in Wales needs a motivated and energised workforce more than ever. There's no way to avoid change in the NHS, but you can manage it well. And if we want to come through it, we must.

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## About the Welsh NHS Confederation

The Welsh NHS Confederation represents the organisations making up the NHS in Wales: trusts and local health boards. We act as an independent voice in the drive for better health and better healthcare through our policy and influencing work, and by supporting members with events, information and training. To find out more about us go to -

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