



EB TRANSITION WORKBOOK

for EB1718

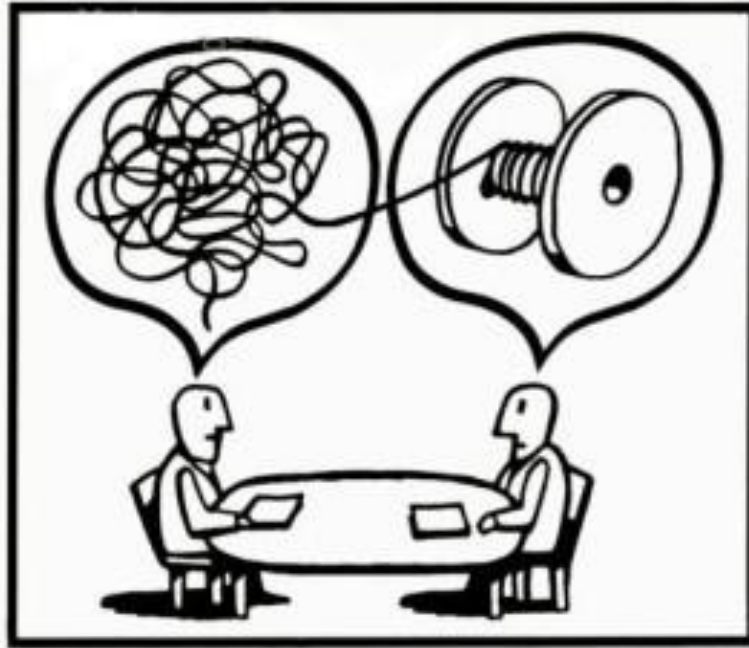
Hello LCVPs !

This workbook created for help your transition process. Go through this workbook step by step, if you don't have a clue where to start preparing your transiton yet.

If you already have something, jump a few steps to make your transiton even more complete.

Enjoy grooming your baby.

Before you get started, let's clarify some important things



transition

Pronunciation /trɑːnˈzɪʃ(ə)n/ ⓘ 🔊 /trænˈzɪʃ(ə)n/ ⓘ 🔊 /trɑːnˈsɪʃ(ə)n/ ⓘ 🔊 /trænˈsɪʃ(ə)n/ ⓘ 🔊



NOUN

[mass noun]

- 1 The process or a period of changing from one state or condition to another.
‘students in transition from one programme to another’

TRANSITION: why

- *To ensure continuity in Operations and processes*
- *To ensure steady growth, and no dip at the beginning of the new team's term*
- *To ensure information and knowledge does not get lost as we move into the new year and term*

What Transition is definitely NOT

- *Treat from the successor to the predecessor*
- *Predecessor's gift to the successor*
- *A 6 hours meeting where you keep talking and the successor keeps taking notes*

The transition process should not disrupt the everyday operations of the LC, rather it should be something additional to what your successor does everyday.

Transition is real! And transition is essential for your successor to start their term on a good note! Make sure you make the personal effort to give your successor the best transition possible!

STEP 1

Inventory

Dear VP by now you have finished more than half of your term and have most likely gathered large amount of experiences, contacts and documents. Before you start transition it is vital that you organize this potential mess to an easy digestible and transferable pile :)

Please do the following.

- *Create a folder where you put all the documents that you have created/used or gotten from the MC. Please create subfolders for each topic.*
- *Make a list of all the contacts in University/companies Network that you have created. Contact them that the your term is ending that you would like to organize a meeting with your with them and your sucessor.*
- *Make a list of all keys, online folders, google docs, passwords, platforms(fb, podio, linkedn etc.)*

STEP 2

Reflect on your learnings!

What are your biggest **successes** in your term so far?

- -----
- -----
- -----

What are your biggest **biggest failures/learnings** in your term so far?

- -----
- -----
- -----

STEP 3

Think about the transition you had,

Learning from 1 year ago

What are the things really made a profound impact on you?

- -----
- -----
- -----

What are the things you wish your predecessor told you but didn't?

- -----
- -----
- -----

STEP 4

Preparing the first meeting

Planning and implementing a role transition is a collaborative process between the current EB and the successor. However the first meeting is your responsibility as current. This is where you set the tone and the ambition for the transition and it is very important to come prepared.

Here is a sample agenda.

1. Greetings getting into the mood.
2. Set up expectations on what both of you expect from this transition
3. Explain the next steps-mapping out learning areas, setting goals, learning and implementing and evaluate.
4. Set up rules of communication-how to contact each other, how often to meet, preferred channels(mail, phone, skype etc.)
5. Q&A about the process
6. Plan regular weekly meetings of 0.5h-1.5h each (longer and you risk information overload, it's better to spread it out)
7. Recap of the meeting

STEP 5

On holding the first meeting

Remember this will be the first impression that you give your successor. So to prepare yourself

- Think about how you want to be perceived by your successor.*
- Think back on your transition, what worked what did not.*
- Think about what you want to achieve with this transition.*

-Accept the fact that your successor is not you!

He/She has different opinions, ideas, personality, learning style and behaviors. And that just because something works for you doesn't mean it automatically works for your successor!

Don't assume anything.

STEP 6

Facilitate Learning!

learning styles

First thing to identify is your successors learning style as it allow to you set up a program.

P.s: People have usually 1-2 preferred styles. Be creative when designing the learnings for your successors style.

Kinesthetic Learning

Learning by doing, these need to work in order to learn. Every piece of knowledge needs to be attached to an action in order for this person to learn. For documents, use quizzes and games. For skills sit down and work with them and afterwards have reflective about how it went.

Visual Learning

Learning by reading and taking in visual information. These people prefer visual ways of taking in knowledge. Reading documents on their own, seeing movies, creating their own overview. For skills provide them with the theory beforehand and sit down and work with them.

Auditive Learning

Learning by hearing and discussing. These people prefer to listen and talk in order to take in more information. Documents bore them. For knowledge go through it together and discuss and talk about during the process. For skills, go through together what you going to do and how to do it. Work together and talk about it afterwards.

STEP 7

Building Skills

1. The elect observe you work
2. The elect does a small part of the work.
3. The elect does the majority of the work
4. The elect does all the work with you there as moral support
5. The elect does all the work without you there

Here's the thing: the only way to build skill in anything is to DO IT. You want to be good in sales, it doesn't matter how many books or trainings you get, until you start working on sales you will not improve your skills.

How to build skills in other people in a simple way.

Schedule meetings where you and your successor do operational work together. If you are sales, you call together, TM-Interviews and so on. To keep it simple you can follow the flow above.

STEP 8

Let's Make a List Now!

As MC BEAT we created Functional Transition Mastersheet for your functional transition besides that you can do things below.

Write all the topics you would like to transition your successor with

- Go through the EB job description together with your successor.
- Map out the areas in the JD that your successor knows and doesn't know.
- Of the areas that your successor don't know map out areas you need support from MC to deliver these trainings. Please contact us about these areas so that we can help.



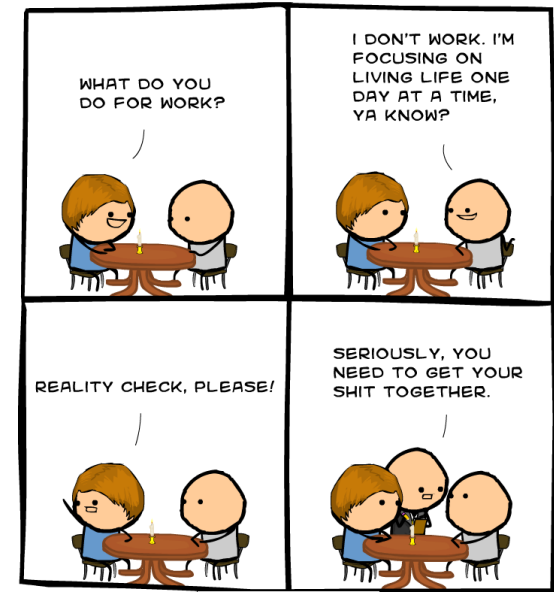
It is VERY important that your successor is comfortable in working with his/her function before he/she gets a team. Because the easiest way to lose motivation of new team members is having a team leader not knowing what he or she is doing.

STEP 9

Reality Check!

BOOM! After all our dreaming, let's check how much time and space you actually have.

1. How many weeks do you from now until your successor start the term?
2. How many weeks you have until your successor arrive office?
3. How many weeks you have with your successor for physical transition?
4. How much time you have per week for this?
5. How much time your successor have per week for this ?



Long Virtual Transition

- Create a comprehensive knowledge bank
- Start as soon as possible
- Schedule non negotiable, consistent transition call

Is this even possible? Hah

- If you are the lucky one with this, avoid doing everything and anything because you have the time.
 - Use virtual transition for knowledge and reading
 - Use physical transition for learning by doing

Short Physical Transition

- Create a comprehensive knowledge bank
- Focus on the most important
- Start from now, document everything that you are doing

Long Physical Transition

- Review your projects, which one will make a profound long impact for the long term?
- Codeliver this project with your successor
- Best transition is on the job, set expectations that your successor is going to start today and learn by doing, give ownership
- Let your successor shadow you, observe you and be with you when interacting with multiple stakeholders

Short Virtual Transition

STEP 10

Scheduling!

*Together with your successor, you may start scheduling your transition call or meeting!
Make sure you set the expectation with your successor that, he/ she is responsible to
keep you accountable to deliver on the topics!*



A background image showing two hands in business suits shaking over a red telescope, set against a blue sky with white clouds. The image has a dark blue overlay.

WHY DO WE CALL THEM

SUCCESSORS?

The background image shows two hands, one from the left and one from the right, holding a red torch. The hands are wearing light-colored shirts. The background is a blue sky with white clouds. The text is overlaid on the image in a light blue, handwritten-style font.

WE MEASURE 50% OF OUR
SUCCESS, BASED ON
THEIRS

The background of the image shows two hands, one from the left and one from the right, holding a red baton. The hands are wearing light-colored shirts. The background is a bright blue sky with soft, white clouds. The text is overlaid on this image in a light blue, handwritten-style font.

WE HAVE FAILED

IF WE DON'T PREPARE THEM TO

THRIVE



*If you have questions, please contact MCVP TM
Püren Pınar Kırac.*

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