Transitions *without* Turbulence

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Transitions Without Turbulence

Leadership transitions are often treated as operational problems to solve. What clients and teams experience, however, is uncertainty.

When a key person changes roles or leaves, nothing may be broken. Work can continue, timelines can stay intact, and still confidence can quietly dip. That's because transitions are not only about transferring tasks. They are also about transferring trust.

This workbook is designed to help leaders manage both sides of that equation. It supports the technical work required to maintain continuity and the adaptive work that shapes how change is perceived and experienced by clients, boards, and teams.

The tools inside are intentionally practical. They are not meant to be completed all at once or followed in a linear way. Use what is most relevant to your situation. Return to the others as needed, especially when the stakes feel high.

The goal is not to eliminate disruption entirely.
The goal is to move through transition with steadiness, clarity, and care.

A Practical Workbook for Protecting Trust, Continuity & Client Relationships

Ruth Fitzgerald
VP of Sales, Visit Spokane

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Transition Snapshot

Clarifying What is Actually Changing

Use this tool at the start of any staff, leadership, or key account transition.

Transition Context

- What is changing?
- Who is transitioning?
- When will the change take effect?

Notes

What is at Stake

Beyond the role change itself, what could be affected if this transition is not handled well?

Consider:

- Client confidence or continuity
- Internal capacity or morale
- Decision-making or accountability
- Relationships or trust

Notes

First Interstate Center for the Arts, Spokane Washington

Technical & Adaptive Work Map

Seeing the Full Transition Landscape

Technical Work

What must be handled to maintain continuity?

- Clear points of contact
- Knowledge transfer
- Coverage plans
- Timelines and deliverables
- Communication cadence

Notes

Adaptive Work

What must people understand, trust, or come to terms with?

- Confidence in leadership
- Confidence in the relationship
- Clarity about roles and expectations
- Sense of stability during change

Notes

Understanding Technical & Adaptive Work in Transitions

This workbook uses a distinction from Ron Heifetz and colleagues that helps leaders clarify what kind of challenge they are dealing with. The distinction is between technical challenges and adaptive challenges.

Heifetz's framework was developed to support leaders facing complex, high-stakes challenges. In this workbook, we apply that lens to leadership and staff transitions because transitions often include both operational requirements and human dynamics that shape trust and continuity.

Technical Work

Technical work addresses challenges where the problem is relatively clear and the solution is largely known. It is the work of creating structure, clarity, and continuity.

In this context, technical work often includes:

- transferring knowledge and historical context
- clarifying roles, responsibilities, and coverage
- maintaining timelines, deliverables, and service levels
- establishing points of contact for clients and partners
- setting communication plans and processes

Technical work answers the question:
What needs to be put in place so the work continues?

Adaptive Work

Adaptive work addresses challenges that cannot be solved through process alone. It involves how people interpret the change and what they need to adjust in order to move forward.

In this context, adaptive work often includes:

- maintaining client confidence during uncertainty
- helping teams adjust to new roles or the loss of familiar relationships
- navigating concerns about stability, trust, and continuity
- addressing unspoken fears, resistance, or fatigue
- rebuilding confidence when relationships feel disrupted

Adaptive work answers the question:
What do people need to understand, accept, or come to terms with for this transition to succeed?

Why Both Matter

Transitions can feel turbulent when adaptive dynamics are treated as if they are purely technical. Strong handoffs and timelines matter, and so do confidence, perception, and trust.

Using both lenses together helps leaders maintain continuity while actively protecting relationships.

Trust Transfer Map

Identifying Where Confidence Lives

Trust often sits with individuals, not systems. This tool helps make that visible.

Stakeholder Confidence	What They Rely On	What They Might Worry About	What Builds Confidence
Client/Board			
Internal Team			
External Partners			

Designing Stability During Change

Continuity Anchors

Identify what should feel steady
for clients and stakeholders,
even as people change.

Examples:

- Decision-making processes
- Communication cadence
- Standards of service
- Points of escalation

Our continuity anchors:

Protecting Institutional Memory

Identify what knowledge must
be transferred beyond documents.

Examples:

- Key relationships
- Historical context
- Decision rationale
- Unwritten expectations

Critical knowledge:

Client Transition Reassurance Script

Example Script

I wanted to reach out personally to let you know that [Name] will be transitioning out of their role with us. I want to reassure you that your account remains a top priority and that we've planned a smooth handoff to maintain continuity.

I'll be working closely with [New/Interim Lead] to make sure all history, context, and priorities are fully in hand. If there are any immediate needs or sensitivities, please feel comfortable sharing them. We're committed to making this transition steady and seamless on your end and to continuing to support the important work we're doing together.

Tone Goals:

- Calm
- Competent
- Confident
- Not apologetic
- Not dramatic
- Not defensive
- Not over-explaining

Language That Often Increases Anxiety

- "Nothing will change"
- "We have it covered"
- "This should not affect you"

Draft a Message

Choose a target audience and craft a message that addresses both continuity and confidence.

Audience:

Message draft:

Check: Does this message acknowledge change and reinforce stability?

Client Trust Continuity Checklist

What to do in the first 72 hours after a key departure announcement

Within 0-12 hours

- ☐ Establish internal messaging (one voice)
- ☐ Confirm client points of contact
- ☐ Identify all active deliverables and deadlines
- ☐ Freeze non-essential client communications until clarity is aligned

Within 24-48 hours

- ☐ Email or call clients with a calm, confident framing
- ☐ Introduce interim or new account lead
- ☐ Reinforce partnership and continuity of service
- ☐ Invite the client to share immediate concerns and align priorities

Within 48-72 hours

- ☐ Provide a micro-roadmap:
  - “Here’s what to expect this week and next:”
- ☐ Demonstrate competence fast:
  - Meet deadlines
  - Follow through
  - Show responsiveness
- ☐ Give updates **before** asked

Trust is rebuilt through proactive communication and predictable follow-through.

Internal Transition Map

Who needs what during the shift?

Stakeholder	What They Need	Who Gives It	Format
Remaining Staff	Clarity on responsibilities	Leadership	Written, then verbal
Interim/New Lead	History + Emotional Content	Departing Staff + Leadership	Guided Handoff
Executives	Risk Profile + Mitigation	Leadership	Memo/Briefing
Client	Confidence + Predictability	Client-Facing Lead	Email + Live Chat
Board (if relevant)	Stability Optics	Executive Leader	Briefing Note

Communication must be tiered, not broadcast.

Knowledge Transfer Prompts

Have the departing person answer these in writing or verbally:

1. What does this client value most that may not be written anywhere?
2. What are the topics or requests that need extra sensitivity?
3. Who are the hidden influencers on the client side?
4. What has been promised — explicitly or informally?
5. What are the risks I see coming in the next 3–6 months?
6. What are the client's pet peeves or relationship traps?
7. What has strengthened the relationship most over time?

Notes

People think transitions are about data. They are actually about unwritten knowledge.

30-Day Transition Timeline

Week 1

Stabilize

- Communicate clearly
- Demonstrate responsiveness
- Maintain confidence and continuity

Week 2

Build Trust with New Lead

- Relationship-building call
- Ask for priorities in their own words
- Reinforce understanding
- Deliver one quick win

Week 3

Show Consistency

- Keep communication regular
- Hit deadlines
- Avoid surprises
- Demonstrate competence

Week 4

Move From Transition → Forward Momentum

- Share a look-ahead
- Introduce proactive ideas
- Affirm relationship longevity
- Return to strategic conversations

About FreshVue

FreshVue is a strategic design and organizational development firm that helps leaders and teams navigate complexity with clarity, connection, and purpose.

Much of our work shows up in moments like the ones addressed in this workbook. Leadership transitions. Key staff departures. Periods of growth or change where trust, continuity, and confidence are at risk. We help organizations manage both the technical work of change and the adaptive work that shapes how people experience it.

Our Core Services

Strategic Design
Translating vision and goals into coherent choices, shared direction, and aligned action.

Organizational Development
Strengthening leadership, culture, and systems to improve performance and resilience.

Organizational Readiness
Preparing people and processes for upcoming change, growth, or restructuring.

Succession Strategy
Identifying, preparing, and supporting emerging leaders.

Leadership Growth
Expanding awareness, accountability, and collaboration using frameworks such as the Kolbe System, the Intercultural Development Inventory, and Immunity to Change.

Collaborative Problem Solving
Guiding multi-stakeholder groups through complex challenges where trust and shared accountability are essential.

Every engagement is designed to leave organizations more aligned, more resilient, and better equipped to lead their own progress.

Strategy that connects. Systems with integrity. Leadership that lasts.

Scan to learn more

VISIT SPOKANE

Ruth Fitzgerald is Vice President of Sales at Visit Spokane, leading sales strategy and client relationships for the Spokane region.

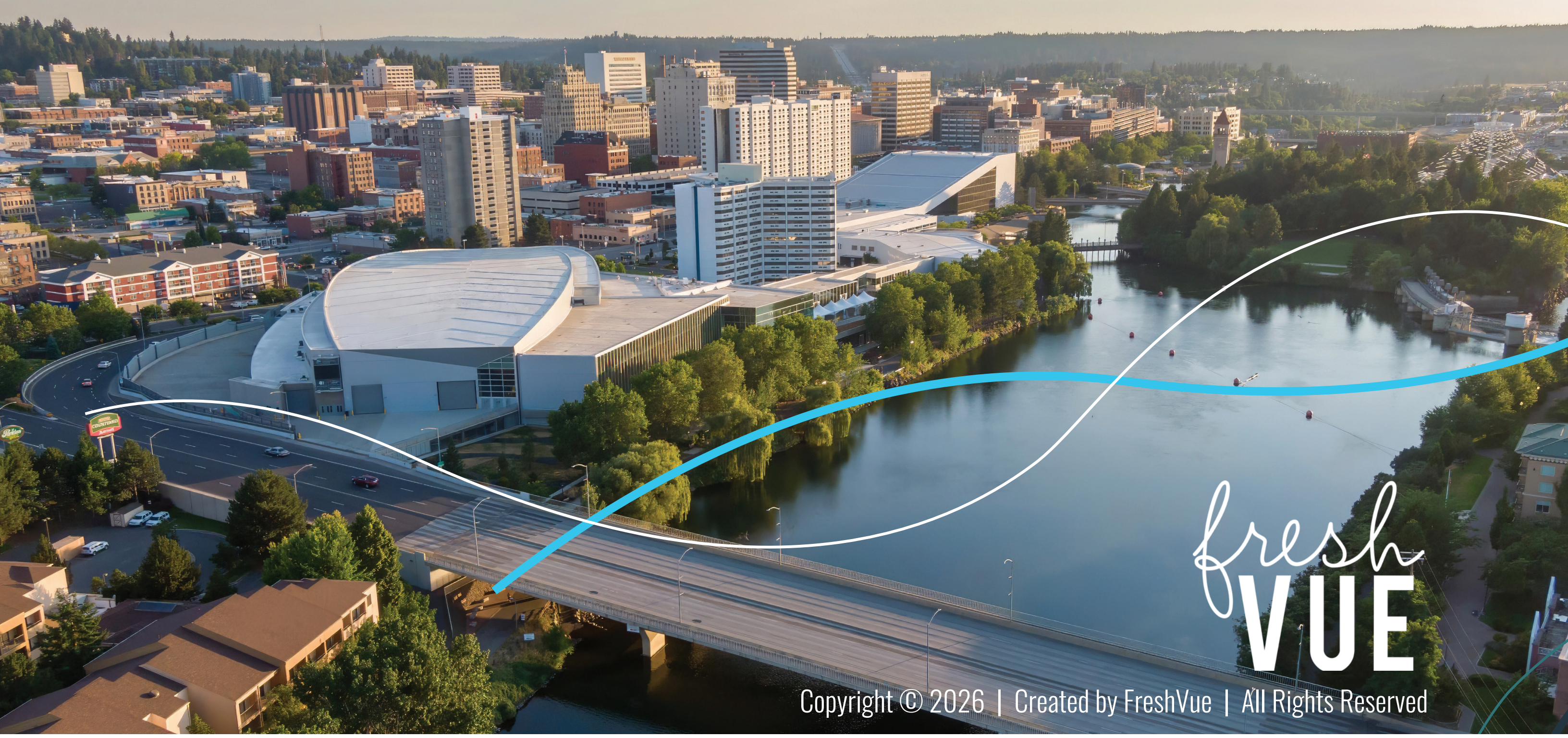
Her insights enrich this workbook by grounding the tools in lived practice from a leader who works every day at the intersection of relationships, service, and complex stakeholder dynamics.

Put these tools to work

You can scan the QR code included here to access fillable PDF versions of the tools in this workbook. This allows you to use the tools digitally, revisit them over time, and apply them when real transitions arise.

If these tools surfaced questions or situations you are actively navigating, we would be glad to connect.

Scan to download a fillable PDF



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