

"Change occurs in the outer world. Transition occurs in the inner. The challenge lies in how to gracefully move through the emotion of transitions in such a way that we are not just surviving the change, but taking advantage of it."

# Guiding Successful Transition Journeys

*By Mary V. Gelinas and Roger G. James*

**I**F LIFE IS about anything it is about change. We change jobs. We get married. We get divorced. We move from one place to another. We switch careers. We have children. We lose our parents. We lose our spouses. Life is a dynamic process. Nothing in it is immutable or permanent.


Some changes are predictable. They occur, like the aging of

our bodies, simply because we are human. Some others we choose. We switch careers, get married, or move to another part of the world. Many are unpredictable and not within our control. A loved one is diagnosed with a life-threatening illness. We get fired. A natural disaster uproots us. Disturbing dreams, losing a sense of meaning and purpose, or surprising fears alert us that we may be on the wrong path and beckon us to change.

But change is not transition. All transitions involve change. But not all change involves transition. Change occurs in the outer world. Transition occurs in the inner. The challenge lies in how to gracefully move through the emotion of transitions in such a way that we are not just surviving the change, but taking advantage of it.

Change and transitions provide unparalleled opportunities for individual, group, and organizational development. Our ability to take full advantage of these changes, especially when they

**CONFERENCE CONNECTION**



**Mary Gelinas & Roger James** are presenters at the 2001 OD Network Annual Conference in Vancouver, B.C. at the following session:

**T207 Guiding Successful Transition Journeys**  
Tuesday, Nov. 13  
2:00 – 5:30pm

are challenging, depends upon three elements: understanding our beliefs about reality; using transitions to initiate ourselves into greater levels of awareness and competence; and creating rituals to help us bring order and meaning to change.

## BELIEFS ABOUT REALITY

From an Eastern perspective, all life is impermanent. Change is the outward expression of the impermanence of all things: thoughts, emotions, and life forms. Just notice the quicksilver movement of your thoughts and the impact on your feelings to see how instantaneously change occurs again and again. Trying to control life or becoming attached to life as it is in this moment causes great suffering. From a traditional or indigenous point of view, life is change. Seasons come and go. Beings are born and they die. Seeds are planted, they grow, they come to fruition and die. Plants and animals live and die in an unending cycle. It is the natural process.

We recently moved from the San Francisco Bay Area to the primordial forests in the far reaches of northern California. Here, we have reminders every day of the cycle of which we are a part. The elk drop their horns in the Spring. The bunched and bloodied feathers of a small bird appear on the trail. The replete hawk is long gone from the scene. Huge redwood trees lie prone on the forest floor. They nurse the small spruce, huckleberries, and ferns sprouting on their decaying flanks.

The desire to control life reflects an underlying fear of and impatience with its never-ending flow. This discourages us from understanding and taking advantage of the opportunities that

change affords us. Transitions take time. They have a beginning, a middle, and an end. Every transition involves loss. It requires us to move through the uncomfortable middle stage, a kind of emptiness or void in which nothing makes sense. Like the seconds between the time we, as trapeze artists, leave hold of one ring and grab another, we may gasp with fear.

But the way out is to go through. We

must enter the nothingness in order to create something new, to achieve resurgence, renewal. To many in the East, there is no difference between this emptiness and everyday life. We always need to notice and to let go of that which we are grasping. They

believe this is the essence of life and it is our inability to see this reality that causes suffering.

## TRANSITIONS AS INITIATIONS

How do we live this life, brimming with change, and take advantage of it? How can we let change in and use it to nurture our development in addition to making peace with it? We can make the most of change by making our transitions meaningful, by consciously using them as an opportunity to align ourselves with the higher or deeper purposes of our lives. Seeing transitions as rites of passage or initiations into a new stage of development opens doors potentially not considered before. We can design transition processes to help us and our clients discover and seize these opportunities. Organizational leaders and individual contributors move frequently among functions, teams, and projects. Effectively handling transitions in role is becoming an essential survival skill in organizations. Viewing these transitions in roles as initiations affords our clients and us the opportunity to be positively transformed by them.

To initiate means to begin, or originate. Through transition processes we can see and become more of who we are. Perhaps all of life's changes are meant to help us find and live out our greater purpose and essence. Initiation in this sense could be seen as a kind of surrendering to a deeper driving force in our lives. Transitions from this perspective can help us forge our beings and provide a sense of direction and meaning to our work and our lives. They can also help us handle what seem to be archetypal issues such as individuating, developing loving relationships, handling our emotions, being interdependent, or clarifying and communicating what we believe.

For example, when we moved our business and home, we thought of it as an initiation into a deeper connection to our work and our selves. If we had not done so, we might not have had the courage to live through the hard work, fear, and sense of meaninglessness that occasionally dogged our footsteps.

## RITUALS HELP BRING ORDER AND MEANING

Rituals are important tools during initiations. They can help us understand, integrate, and give meaning to these initiations. They can honor and celebrate change. These ceremonies can help us open more to our experience, understand the meaning of the change, and acknowledge and celebrate what has been attained. They can help us catch up to ourselves.

All cultures have rituals for initiations. Rituals or ceremonies are symbolic actions that celebrate or commemorate an event or a process in an individual's or a community's life. They can help delineate or shape development, strengthen alignment with nature or self, and establish a connection with that which is held to be important, sacred, or divine. Rituals can help an individual or group move through the suffering or pain of change.

### AUTHORS

**MARY V. GELINAS, Ed.D.** and **ROGER G. JAMES, Ed.D.** are the founders and principles of Gelinas♦James, Inc., a consulting firm using practical and inspiring approaches to help organizations thrive in a dynamic and complex environment. Roger and Mary have co-authored numerous books and articles on creating sustainable change, including *Collaborative Change* (Jossey-Bass, 1998).

Rituals can be unique and designed in the context of a specific change or they can be incorporated into everyday organizational life. For example, an organization can celebrate the launch of a new product or honor important events in employees' lives. Regardless of whether they are singular or regular, rituals generate their full impact when the activities are meaningful to the participants, and they are conducted with clear intention and consciousness. Any activity done with mindfulness and intention can be a ritual.

For example, when we left the Bay Area, we invited our closest friends to our home for the "last supper." During this ritual, we acknowledged what their friendship meant to us and thanked them for the support and guidance they had provided us over the years. This helped us let go of what had been our home for many years and opened us to friendships in our new home.

The essential components of ritual include: 1) clarifying one's intention; 2) preparing for the ritual by gathering materials; 3) preparing the space in which it will occur; 4) repeating the intention and centering; 5) conducting and experiencing the ritual; and 6) expressing gratitude and integrating the meaning of it. The integration aspect of this last component often is not completed until after the ritual is completed.

Rituals in organizations can help people transition into the new state externally and internally. For example, in one client organization a small group's work had become unnecessary due to the installation of a new information system. They decided to hold a funeral to mark the end of the team. They dressed in black, built a symbolic coffin and burned it. They talked about their sadness at breaking up the team, expressed appreciation for what they had learned from one another, and shared their hopes for the new roles into which they were moving in other areas of the organization. They were better able to make the change because they consciously started their personal transitions.

There are, of course, challenges and opportunities in bringing the perspective of initiation to clients. The **challenges** include the following:

**Outside the box.** The notion of personal development may not be familiar to our clients. Or, they may not see it as appropriate to deal with more personal feelings and issues at work.

**Organization culture.** It may be outside the norm to talk about anything other than the intellectual or tangible aspects of work.

**Impatience.** Many organizational leaders are not patient. When a change is announced, they expect people to salute and make it happen. Allowing time for the transition process is hard. They want people to "get over it" more quickly than our natural timing allows. Change can happen overnight. Transitions take the time they take.

**Leap of faith.** Opening ourselves to the unknown is hard.

Despite scenario planning, goal setting, and visioning, we are not seers and cannot predict with any certainty what will happen. For our clients to open themselves to the necessary and more profound possibilities of initiations requires that they open-heartedly ask, "I wonder what will happen next?" Here's the even harder part. They need to wait for the answer to emerge, rather than force premature closure.

The **opportunities** are many. Here are two.

**Renewal.** By expanding the scope of transition work and thinking of it as a kind of initiation, we can help our clients increase their sense of well-being and deepen their sense of meaning and purpose. However, there is a catch. If they are to be initiated into new parts of themselves, they need to let go of old parts. They need to let go of the old job or role as well as the expectations, identity, and dreams that are attached to them. There are no short cuts between the Fall and the

Spring. Winter is essential to the renewal of the Spring.

**Increased ability to lead.** By going through an initiation process, leaders can attain two critical things. First, they can have a clearer sense of purpose for what they are trying to accomplish. This purpose will be a stronger one because it will be rooted in personal and professional motivations. Second, leaders will have an increased ability to create change. If they have gone through the process themselves, they have a better appreciation for what it really takes to help an organization and all its members transition to their next level of development.

---

**Perhaps all of life's changes  
are meant to help us find  
and live out our greater  
purpose and essence.  
Initiation in this sense could  
be seen as a kind of  
surrendering to a deeper  
driving force in our lives.  
Transitions from this  
perspective can help us  
forge our beings and  
provide a sense of direction  
and meaning to our work  
and our lives.**

---

## INITIATIONS AND ORGANIZATIONS

Paying considered attention to the initiatory opportunities that transitions provide is critical to individual and organizational capability building. There are huge costs to ignoring the transitions required to effectively implement change. Perhaps this is one of the major reasons that the vast majority of change initiatives fail. How many failed change initiatives have we witnessed or been party to because the necessary period and process of transition was not an integral part of the change process? How much potential was squandered by ignoring the emotional and spiritual shifts initiated by the external changes?

There are a number of **approaches** that we can use with our clients or ourselves to help move through a transition process. Depending on your intention and that of your client any of these can be conducted as a ritual or be woven into one. We have organized them according to their source.

**Western psychological.** These tend toward more logical or intellectual exploration and conversation. Some of the ones we use include:

**Transition meetings.** These are one-on-one or group conversations during which the leaders or team members who are changing roles or moving from one function or organization to another deal directly with transition. These conversations include developing a common understanding of the purpose of the organization, clarifying or redefining vision and goals, and articulating mutual expectations. In transitioning a new leader into an organization, the leader asks the new direct reports to share their perspective about the organization, what is working, what is not, what is needed and what contribution they would like to make. Most frequently, transition meetings focus on the physical and mental aspects of transitions. When handled well, they also consider the emotional aspects. There are farewell and inclusion rituals.

**Personal style assessments.** When people know their styles, they are more able to anticipate their own response to change, ask for what they need, and work more effectively with others in times of change.

**Mission and vision.** Confirming or clarifying an organization's purpose and painting a picture of the desired future can inspire people to focus on the future and be more comfortable letting go of the past. Asking people to clarify their personal mis-

sions and visions can enrich the organizational visioning process. This process can also help them figure out how to live out their life's dream in their current job or move on to one in which they can.

**Change models.** Introducing models helps people understand the natural process of change. This enables them to better understand and deal with their reactions as well as those of others. The models we find most helpful are those of William Bridges, Cynthia Scott and Dennis Jaffe.

**Dialogue.** Framing conversations as dialogues helps people listen more intently to themselves, to one another, and to what is emerging from the collective. Encouraging them to inquire into one another's assumptions and beliefs unearths the deeper questions that may be underneath their concerns and fears.

**Traditional or indigenous.** These approaches use nature as the primary source of guidance. We draw largely on the work of cross-cultural anthropologist Angeles Arrien for our understanding and use of the following:

**Seasons.** In traditional or land-based cultures, each of the seasons is associated with a meaning. We use these to help clients discern what is occurring inside them and their organization. For example, in the Spring we ask what seeds they are planting or want to plant with themselves and the organization.

**Walking gently.** Walking consciously out of doors can nurture a sense of connection and calm that engenders an intuitive understanding

beyond the intellect. One can pose a question, let it go and then walk. An answer frequently pops to the surface during this quiet, gentle walking.

**Story telling.** Life can be viewed as a series of events. However, it is the story that weaves these events into a meaningful whole. Story telling can be used to support both individual and organizational transitions. When individuals tell their life story the patterns and rhythm of their lives become clearer. Often they can see the issues with change they have had in the past and they can reconsider how they want to handle these issues in the present. Story telling can also help connect them to the heritage they carry personally or professionally as well as to the legacy they wish to leave. Both of these provide a rich context within which to understand the change they are undergoing. Asking people to tell the story of the organization of which they are a part can help them experience a connection

---

**Paying considered  
attention to the initiatory  
opportunities that  
transitions provide is critical  
to individual and  
organizational capability  
building.**

**There are huge costs to  
ignoring the transitions  
required to effectively  
implement change.**

**Perhaps this is one of  
the major reasons that the  
vast majority of change  
initiatives fail.**

---

to the whole story of which they are an integral part. They can see how they are helping write the next chapter.

**Original medicine.** Like story telling, this is a notion that can help individuals align with a deeper driving force in their lives. Each of us has a unique set of gifts; the essence can be a guiding light as we travel through the void between the past and present to the future. Each of us has a unique set of challenges that are the shadow aspect of our gifts. These challenges usually express themselves more frequently during times of change. Understanding this can help us have more compassion for others and ourselves.

**Shamanic journeying.** Through the use of a drum or rattle we can evoke an altered consciousness that allows us to access knowledge that transcends our individual experience. The drum can be thought of as an imitation of the human heartbeat. The rattle reminds us of the rain. Each can connect us to the natural world and our place in it.

**Vision quests.** Through extended time of internal reflection in nature, we can access a knowing that is beyond the rational. It is the energy or wisdom that people have been accessing through fasting, isolation, and meditation since time began.

**Honorable closure.** We take this directly from the work of Angeles Arrien. It is an extremely effective tool to help people let go of the present and move on to what is next. It involves asking and answering four questions: 1) What are you grateful for in this relationship? 2) What have you learned? How are you changed as a result of this experience? 3) What challenged or stretched you? 4) Is there anything that needs to be forgiven or rectified before you move on?

**Eastern:** These practices look to awareness and clear-seeing as a path to get beyond impermanence and access our stillness and inner guide. Here, we draw on the work of Natalie Goldberg, Julia Cameron, Teresa Von Braun and various Buddhist teachers and writers.

**Meditation.** Through silence and following the breath, it is possible to calm our minds so that the stillness and inner wisdom can move to the foreground. This still quality of mind can be a resting place amidst never-ending changes.

**"First thoughts" or "morning pages".** Writing early in the day, or writing without a thought to grammar, coherence, or logic helps us become more intimate with what is going on in our interior landscapes. The themes, images, and symbols that emerge can guide us along our frequently ambiguous and circuitous initiation paths.

We add a word of caution about these approaches. Transitions have their own time, their own dynamic. Approaches do not shorten the process. Rather, they can help us let go, open to the process and enrich what we learn along the way. As we noted earlier, there are no short cuts through the dark days of Winter.

## EXAMPLES OF OUR USE OF APPROACHES

When we took our leave of a client organization with which we had worked for four years, we made "honorable closure" with our clients. These one-on-one meetings were in addition to asking for feedback on our work and evaluating its impact on the organization. These closures enabled our clients and us to move onto what was next, with no unfinished business and our hearts full of gratitude for what we had experienced and learned.

Two senior executives believed that blocks in their relationship were compromising their ability to lead, and hinder the quality of the work of their critical department. In partnership with our clients, we planned two, one-day off-sites in the Winter and Spring at a rural retreat center. We developed a series of experiences that drew on the meaning of each of those seasons. The experiences included personal and professional visioning, dialogue, meditation, gentle walking, journal writing and a shamanic journey. They did preparation work prior to each session and left with personal work to continue afterwards. These sessions led to increased clarity about what each of them wanted to do. It also enabled them to move themselves and their organization forward with grace.

A controversial decision was made to appoint a leader from outside the organization to lead a critical function rather than promote the "obvious" candidate from within the organization. This decision was further complicated by the friendship between the newly appointed leader and the one who was bypassed. The new leader decided to take her team off-site for a transition meeting. At the beginning of the meeting, she responded to a list of evocative questions about who she was, what she cared about, what people could expect from her, and what she would expect of them. She then left the room so that the new group of direct reports could talk about what they had heard including what they liked, what surprised them, and what concerned them. When the new leader rejoined the group, they shared their responses with her. Her honesty inspired theirs. Thus, they were able to clear the air and move forward together.

## GUIDING PRINCIPLES

In each of these examples and in all other situations in which we have supported the transition process, we have followed a number of principles. When a transition is approached as an initiation, following these principles is critical. We highlight a few of them here.

**Honoring our client's beliefs about reality.** Scientists and engineers dominate in many of our current client organizations. In private, a few of them are willing to explore the more interesting implications of quantum physics and chaos theory. In public, they focus on data and practicalities. So, in discussing transition processes we respectfully challenge their tendency to

overlook or ignore the human process of change. We frame the more personal questions in terms of the legacy they hope to leave their family, organization, and profession. We provide research data to support our positions whenever possible. Although we may be more comfortable talking about these matters in less down-to-earth ways, we accomplish the same end by honoring their point of view and respectfully pushing the envelope of their beliefs.

**Designing and building agreement** on the process. Given the potential of many of the techniques we described, it is imperative that clients understand and agree to use them. Education and influence is an important part of our role in helping individuals and organizations develop. However, decision-making about which approach is right for them must be left in the hands of the client. It is they who know what is right for them. For example, in proposing the use of shamanic journeying with our client, we described what it is, its history, its purpose, its appropriateness to their situation, as well as our own personal experience with it. They agreed to try it.

**Being present.** Ultimately, the quality of our work depends on our ability to bring ourselves fully to being with our clients. It is this very presence that enables them to bring more of who they are to the situation.

**Trusting that whatever needs to happen will.** It is so easy to let our own view of what we think needs to happen blind us to what is happening. Transitions and initiations have their own timing. Our job is to open the door and stay fully present to what emerges and bring our knowledge and skill to bear.

**Learning from our experiences.** Although we have been integrating this perspective and these practices into our work, we are just beginning to understand their potential for positive impact. As the pace of change continues to increase and our client work involves more cultures, we take advantage of oppor-

**When we took our leave  
of a client organization  
with which we had worked  
for four years, we made  
"honorable closure"  
with our clients.**

**These closures enabled our  
clients and us to move  
onto what was next, with  
no unfinished business and  
our hearts full of gratitude  
for what we had  
experienced and learned.**

tunities as they show up and consider carefully the impact on our clients and on us.

## CONCLUDING THOUGHTS

Life is change. Not allowing and enabling individuals, teams, and organizations to make the transitions they need squanders precious opportunities. Thinking of these transitions as opportunities to initiate us into new levels of understanding, ability, and consciousness opens new and exciting doorways for us and for our clients. Rituals can help us see and walk through these doorways. There is still much to learn about how to integrate and apply the wisdom and practices of various worldviews to help us travel these paths with vitality and grace. ■

*We are grateful to Teresa Von Braun, M.A., for her inspiring and practical information about initiations and ritual.*

## REFERENCES

- Arrien, A. (1993). *The Four-Fold Way: Walking the Paths of the Warrior, Teacher, Healer and Visionary*. San Francisco: Harper-Collins.
- Bridges, W. (2001). "The way of renewal." *The Works*, Winter, 2001, pp 27-29.
- Bridges, W. (1980). *Transitions: Making Sense of Life's Changes*. Menlo Park, CA: Addison-Wesley Publishing Company.
- Cameron, J. (1992). *The Artist's Way: A Spiritual Path to Higher Creativity*. New York: Jeremy P. Tarcher/Putnum.
- Goldberg, N. (1986). *Writing Down the Bones: Freeing the Writer Within*. Boston: Shambala Publications.
- Jaffe, D. and Scott, C. (1999) *Getting Your Organization to Change*. Menlo Park, CA: Crisp Publications.

Gelinas♦James, Inc.  
Organization Consultants  
P.O. Box 689  
Trinidad, CA 95570-0689  
Phone: 707/488-2524  
Fax: 707/488-2724  
[www.gelinasjames.com](http://www.gelinasjames.com)