

Title: People in transition

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Abstract:

Human resource development professionals can help individuals and organizational systems recover from major changes by employing a seven-stage model of personal change. The factors that influence the transition experience include: the clarity of expectations about the effects of change, the stage of life of the people who are undergoing the transition, the number of related transitions that people must cope with, the ability of the participants to face the truth, the self-awareness of the participants, and the time boundaries of the transition period. The seven stages of change are: destabilization, minimizing the impact of change, questioning self-worth, letting go of the past, examining the new situation, searching for the meaning of the transition, and integrating the transition experience.

Full Text:

People in Transition

At a time when change is becoming a way of corporate life, training and development specialists are learning to support their clients in understanding the dynamics of transitions. And while there are many well-developed approaches to managing complex change on a group or system level, we feel that what has been missing are equivalent models for helping individuals affected by major changes get back on their feet in an efficient and productive way.

In response to this need, we have developed a seven-stage model of personal change that training and development professionals can use to help individuals as well as organizational systems recover from major changes more quickly. If training and development professionals can help make personal change more understandable and less fearful, employees will have more energy to focus on the growth opportunities that change offers, rather than on the resistance uncertainty often engenders.

Transition factors

One of our basic beliefs is that the transition experience is predictable and quite normal. A sequence of responses and changing personal focuses has emerged from our research and training experiences--a sequence we can easily describe.

In any particular transition, whether it be the end of a relationship or a major promotion, people may experience the phenomenon we call "backing and forthing," in which they oscillate among the seven phases of our model. From day to day, or even minute to minute, they may find themselves alternating between feeling strong and optimistic about the change and feeling overwhelmed and helpless. They also may find that they experience a long period of feeling angry at the world in response to one transition, while they barely experience this emotion at all during another.

What follows is a description of the characteristics that influence the intensity of the transition experience. While there are some things people can do to speed up the uncomfortable parts of the process, we're sorry to report that we have not yet come up with any sure-fire ways to avoid them altogether! In fact, if people avoided the tough parts of the adaptation process, we think they would miss many of the learning opportunities we believe are inherently present in every transition.

Many people have described their transition experiences as being like a wave of change. Others refer to having set off a surprising chain reaction. Still others report that they were on a roller-coaster ride, on a train, or in a tunnel. Whatever the case, there are several factors that seem to determine how intensely one experiences a transition.

Novelty. One of the most influential factors is novelty--the degree to which the change takes us by surprise or places us in an uncertain or unfamiliar situation. It puts us "in the dark" in a significant way. High novelty generally means that we will be much more intensely aware of the transitional stages. It often also means that we will do more backing and forthing between the stages.

Clarity of expectations. The clarity of expectations about the outcome of a change also seems to be an important factor influencing the intensity. People with a clear vision of the outcome of the change usually experience lower

intensity and also seem to move through the sequence more rapidly.

If a person consciously chooses the transition, he or she can develop a fairly complete set of expectations prior to getting started. On the other hand, if someone is taken by surprise (high novelty), establishing clear expectations as quickly as possible becomes very important.

But keep in mind that self-initiated transitions are by no means guaranteed to be low in novelty or stress. We certainly hear from others about, and have ourselves experienced, unexpectedly high levels of novelty in voluntary, self-initiated changes. Often, seemingly easy chosen transitions such as moving to a new home develop high novelty when people discover, for example, that they can't get certain goods or services that they have come to rely on in their old location.

Stage of life. The stage of life someone is experiencing at the time of a major transition can also be a key factor in determining its intensity and in determining the speed with which one can move through the sequence. As described by Gail Sheehy in *Passages* and Daniel Levinson in *Seasons of a Man's Life*, some stages of adulthood are predictably stable while others are predictably turbulent--the mid-life crisis being the most widely cited example of a turbulent, self-questioning period. Major changes such as marriage, divorce, and career shifts undertaken during a stable life period will be less of a jolt and may seem to require less energy to adjust to than if undertaken during a turbulent life period.

Number of other transitions. Someone who is already dealing with a divorce and a career shift likely will be more upset and face a more intense transition over the death of a parent than will someone who is not experiencing other major changes at the time of bereavement. This factor is interrelated with the stage of life, as a major transition can be the catalyst to move us from a stable life phase to a turbulent one or vice versa.

The number of transitions is also a factor in determining the intensity of the experience, because undertaking one change, such as a major career shift, generally triggers additional major transitions such as residence change, relationship changes with children, social life changes, and, frequently, spouse changes and entry into a new intimate relationship. It is not unusual for people today to experience multiple transitions, requiring a variety of coping skills and potentially creating high levels of stress.

Truth. Sometimes it is difficult to face up to the truth about what's really going on when we're in the midst of a life change. Western cultures generally place a high premium on being publicly "okay." In most places, we're not encouraged to express our vulnerabilities or uncertainties. Instead, we're rewarded for maintaining a stiff upper lip or for being "gutsy."

The cost of fitting into our "be okay" culture is that, unconsciously, we begin being untruthful to ourselves as well. The more strongly we deny to ourselves the significance of a change, the longer it is likely to take for us to reorient ourselves to the new situation and the less likely it becomes that we'll learn much from the transition process.

Self-awareness. This is another factor that has a major influence on how intensely we experience transitions and how quickly we move through them. Each of us has our own particular preferences, temperaments, and ways of doing things. The more aware we become of these aspects of ourselves, the better equipped we are to handle effectively and to benefit from life's transitions and to accept the growth opportunity that changes have to offer.

Most people find that significant transitions bring their major life issues into focus. Some people, for example, spend a great deal of effort throughout their lives establishing their sense of who they are. Others expend equal efforts establishing their sense of their capabilities or competencies, while others focus their energies on where they belong. And still others focus on being active and making a useful contribution. If we know what our fundamental life issues are, we are likely to be better equipped to cope with our transitions. It also helps us see that we don't have to experience life in the same way as others around us. Further, a transition frequently includes some answers to these fundamental questions.

Time boundedness. A final factor is time boundedness. The transition sequence is very elastic. If there is a specified ending time--such as one experiences on vacation or with a temporary work assignment--the pace of the transition is often set. It seems that when we know when an endpoint will be, we unconsciously pace ourselves to complete the entire cycle in the time available. This assumes, of course, no major blockages relative to the previously described factors.

The seven stages

We have found it useful to associate the seven transitional stages with what we call a "morale curve"--shown in the accompanying figure--because it accurately describes the shifts people experience in mood, morale, and sense of

self-worth. The one drawback is that this curve reinforces the idea that our adjustment to personal change proceeds linearly. When looking at the curve, be sure to keep in mind that at one point in time you may move from left to right and at another, from right to left. It's also possible to get stuck at some point for quite a long time.

The dotted line at the left side of the curve suggests that in some cases one may not experience an early "high" as the transition gets underway. Most often, when a person initiates the change there's an early peak in mood, morale, and sense of self-worth. On the other hand, when the change is thrust upon that person and is unwelcome, a rapid decline in mood, morale, and self-worth may begin immediately.

As you read over the following stages and relate them to the curve, reflect on one of your own recent transitions. As you reconsider its onset, what's happened since, where are you now, and what are you anticipating, you will find it much easier to hook yourself into these descriptions. It's also likely that you'll quickly be able to see how far you've progressed with your transition and gain some insight into what may be your next steps in adjusting to the change.

You may also find that you need to add a stage to our list or that you may have skipped one of our stages along the way. Feel free to modify our model so it works for you. We have consistently been pleasantly surprised that most people find that our seven stages are very accurate and helpful to them.

Stage 1: Destabilizing and losing focus. As soon as someone becomes aware that a change has begun, a sort of numbness occurs and feelings of unreality are likely. It's rather like the experience of looking through a camera when the lens is out of focus: what used to look clear now seems fuzzy. With a greater degree of novelty you may even feel overwhelmed or immobilized. Most people report that at the onset of a transition they felt they'd lost focus and had difficulty making plans, concentrating, and keeping things in perspective. One thing to learn as you pass through this stage is that stability in life is an illusion and that we are constantly experiencing transitions.

Stage 2: Minimizing the impact. It seems the most natural--or at least the most frequent--way people get through the first stage is to attempt to return to "business as usual" and to minimize the impact of the change. In cases of very high novelty, you may find yourself denying that any change has taken place at all and proclaim a sense of euphoria and "okayness." This stage provides a temporary retreat from external reality in order to allow us to regroup our inner resources. The key opportunity in this stage is learning to tell ourselves the truth and build our courage through judicious risk taking.

Stage 3: Questioning self-worth. Eventually the external realities assert themselves as denial and minimization become less functional. At this point, people are likely to become aware that they are quite stressed. They will also probably experience a growing sense of depression and powerlessness--with occasional bursts of anger--because they feel little if any control over the present situation and their emotions. Even in the case of a welcome or a self-initiated transition, it is likely that the magnitude of needed adjustments will create a period of self-doubt and self-questioning.

A major lesson at this stage is that it's okay feel down or angry, and that the harder one tries to get over it, the longer it seems to last. You may even move back to Stage 2 if you try too hard to get through this often painful stage. The best advice we can give is to allow all the time it takes to finish this stage fully before moving on.

Stage 4: Letting go of the past. Up to this point, there has been an often unconscious attachment to pre-transition reality--a sort of anchoring in the past. If you are to pass through Stage 4, you must tell yourself the truth about the new reality and consciously choose to assume responsibility for the future.

As people make this choice, they find that they are replacing recollections of what was with visions or preferences about what can be. In other words, they now choose to anchor themselves in the future--to move toward something rather than away from it. Successful experiences that support the new reality and new direction are most valuable here, because each one generates a great deal of energy and forward momentum. The key learning opportunity here is that we can become self-determining. In other words, we take more personal responsibility for creating the outcomes we want for ourselves.

Stage 5: Testing the new situation. This is an exciting stage full of energy and enthusiasm. As people break free of the past and step confidently toward the future, they actively seek ways to test themselves in the emerging new reality. Self-validation comes from trying out new behaviors and developing new skills. You may even find yourself feeling like a missionary at this stage, having "seen the light" and wishing to pass it on to others. The key lesson in this stage is the growing self-confidence that arises from acknowledging that we determine our own paths in life.

Stage 6: Searching for meaning. This stage is a gradual shift in emphasis or focus from high levels of activity and involvement to seeking to understand what all the activity has really meant. It becomes a period of reflection in

which it is important to figure out the implications of the transition for one's life as a whole.

The key learning opportunity here is in gaining a deeper insight into the way we deal with change; how it affects our relationship with ourselves, our work, and other people. It is a time to strengthen our self-esteem and to stand back from the situation and view it from a more objective perspective. Another lesson that results from this stage is the development of a greater awareness of one's true or higher purpose in life.

Stage 7: Integrating the experience. The contemplations of the previous stage allow us eventually to incorporate our discoveries and experiences into everyday life. As new behaviors and fresh outlooks sink in and become second nature, people find that they relate to the world in new, more confident ways without stopping to think about it. At this point you may safely conclude that, with the exception of occasional flashbacks, your adjustment is, for all practical purposes, complete. You may well continue to learn new things as a result of the transition in question, but most of your time and energy are now available to focus on other areas--perhaps the next major transition.

Spread the word

There are learning and growth potentials inherent in every life change we face. The more we can help our clients adopt a learner stance and allow the process to operate by resisting the temptation to force it along or to convince others that they are more adjusted than they in fact are, the more they are likely to benefit. From this position they will maximize their new insights, new knowledge, and new wisdom while also affirming a true sense of personal freedom and a greater experience of self-determination.

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