

Case Study - Internal Transfer Dilemma - Released 19 October 2021

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Welcome back. I'm Kim Baillie. She's Fulyana Orsborn and this is Inside Exec. We're going to look at a case study today that's been sent to us and I will read out what the situation is. It's in the first person so don't think it's about me necessarily at this point it is a case study. I've been working in my current team for over three years and I like the work and enjoy working with my boss and the team members. I believe it's time to gain broader experience by going for an internal transfer to another team. I approached my boss about eight months ago but she didn't seem too keen. I do want to expand my knowledge but I don't want to offend my boss. What is the best way to go about it. Okay, well we really appreciate people sending in those case studies asking for our opinion. The first thing that comes to mind is I can see it from both points of view when you're good and you're working really well in the team and your boss doesn't want to lose you.

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That's a compliment. However, I think a good boss is also one that help you grow at the same time. So I think firstly absolutely talk to your boss, talk to your boss find the right time, find when there's no no other distractions and when things are going smoothly, just talk to her about why you want to transfer and just say what you just said to us is that you love working with the boss and you like working in the team etcetera, but that you want to expand your knowledge and you want to grow your career so that in itself should help also try

and look at from her point of view or his point of view. What is it that you might help with that? So how easy have you made it for someone to step into your shoes? Talk about that and then just say let's put a time frame around it. I'm not saying I want to leave tomorrow, but let's put a time frame around it.

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Let's talk about how can I make it so that the transition will be really smooth. I haven't got anything lined up elsewhere. So I have to work on that with your blessing and support. And in the meantime we work on a time frame of how many weeks or months we need to build a replacement for me, talk her through all the procedures and that the place is not going to shut down just because you're moving, the place is not going to fall apart because you've already got something established. But if you haven't, please do first and then talk to that, talk about how you can leave it continued to operate as well as it has been with you in it and then what you want to do and let your boss know that at the later stage you might want to come back to that team if that's your wish. But that's where I would start. I think we have a little bit in terms of emotional decision making, which we've talked about previously, but also about you've waited eight months and neither of you have said anything about it.

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So it's still bubbling away under there and there's still some unresolved issues that you need to address. I would approach it by taking the lead basically and going to the boss saying, I'm concerned, I need your help and appeal to their nurturing

instinct, which is probably one of the reasons why you'd like to work with them and be in this team is saying I've made some decisions about my career, but I can't move on those until you help me to resolve what needs to be done within this team so that I can leave it in the best possible way so that you're not, landed with another headache, another person to train necessarily. And the team is disrupted as little as possible. I want to help the transition, but I need your help to decide what it is that I need to do. So that it will work for you and for the team as much as me gaining this external experience is going to work for me and appeal to them, appeal to their better nature.

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Appeal to what might be the underlying worries that they've got about this transition period fall on your sword and say, I know that I told to you about this eight months ago and nothing's happened since. And I don't want you to think that I've been sitting here worried about when I can leave and thinking more and more that you are stopping me from leaving and just appeal to them, the boss for help and for assistance for the transition. But make it clear that it's going to happen and what you want is that it happens in the best way possible for the boss and for the team, which I think we're both saying, but just some different approaches to think about. So that it's not, I've made this decision and you're not helping me. It's I need your help to make it the best possible for everybody including me. I'm not putting me first and putting the team first, I'm putting you first, but it's still going to happen...

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Most organization have some sort of a performance review, career and training development type of process of some sort, I guess one is that review how you're going and what's the future. What's your next steps, anything like that should reflect that one of your growth or let's say for example, you would say this is what I'm good at, this is the performance and this is your exceeded expectations and all of that. And then it says now the next step is to do this, A. B. C or D. And to get there. You need to get experience in this. You need to go to training programs on that. You need to go to seminars or be part of an industry forum or whatever it is, whatever you've got in that space, it'll be really good if you can put that in it. Part of the process that you follow for everyone, it is about personal development, it is about addressing strengthening your areas of strength and supporting the areas of needing growth.

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And that always helped because people reflect back on that and make it happen. So if you don't have that, maybe you want to talk about that for the future. But most organizations have, you know something on those lines following on from that. If you feel that for example, you wanted to get some marketing experience and you know that you're not going to get that or you feel that you're not going to get that within your team, you go to the boss, you say, look, the reason that I maybe I didn't explain it clearly enough last time, but I want to expand my knowledge in the marketing arena and I don't think that I can do it within this team. Is there somewhere else that you can recommend in the organization or do you know of an opportunity within the organization where I could I could get

that expertise because might know of somewhere that they'd like to see you go, they'd be more comfortable that you were going rather than somewhere that they might not have any more interaction with you, or they might not want you outside the organization altogether. Well, that they don't want you to leave the organization as a whole and get them on your team, get them on your side by looking for opportunities that are going to benefit them, make them look good, the result that you want just to add to that.

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I think sometimes there might be an opportunity for secondment outside. So if you approach it, the way, just said kim and then the person will say, oh, you know, we don't have that, but one of our, I guess, friendly organization that we work with or whatever we can work on a secondment. They're in the same industry, We're not competitors, we help them, they help us, they have that expertise there and you can go there and so there's a whole lot of opportunities that can be pursued if you address it the way being suggested. Yeah. And it's the same with not justifying why you want to go, but explaining what it is, you think to gain how that will benefit the organization if you talk to a boss eight months ago, and nothing has been mentioned since, and they're worried about a whole lot of things, about what they'll do to replace you, about why you want to go, about why you want that particular kind of experience or expertise and they might not understand any of those things.

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And so I think if we look at not so much the personal interaction side of it, but the experience that you're getting and why you think you need that, where is that going to benefit? Not just you, but organizations that you work with, so that you're very clear about it, because when you have to sit down and write out that kind of justification, it then becomes much clearer to you that you are looking in the right place or you're not looking at the right place. It might be that eight months ago we use the marketing example as well, eight months ago you thought you needed marketing expertise because that would help you do something within the work that you're doing now. And when you look at it now, when you write it down now and have to justify it to someone else or explain it to someone else, I should say, it might be that it's not that important anymore, there might be something else that's more important. So, you need to review it over that period of time. You really need to review it rather than just get fixated on the idea that this is what I wanted to do.

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And this is when I wanted to do it and I've been held up eight months because no one said anything, make sure that's still the area. It might be something else entirely now and that's fine, do that explanation process so that you're very clear and you can talk about it comfortably without getting defensive about why you want to go or what it is that you want to do, think about and be clear about what it is that you want to get out of that change of environment. Another thing is you, because it hasn't been raised for eight months, your boss might be thinking you changed your mind because you didn't say anything you know, it's both ways. So the boss hasn't

come and say, oh you talk to me about that you know and follow up from there, but you didn't follow up either. So your boss might be misunderstood. The fact that you didn't raise it is because you change your mind and it's not important to you anymore. And given that, if we look at it that we've had a fairly topsy turvy 18 months of time, it might be that a whole lot of other priorities and working environments have taken precedence over that particular thought process.

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In both your minds at this point, we hope that all of that discussion, we've given you some things to think about. If you are in this situation, as we say with all of our case studies, if you've been in this situation or you've come through it and you found some solutions that work for you. Please share those with us so we can in turn share them with the rest of the listeners. For now, I'm Kim Baillie. She's Fulyana Orsborn. This is Inside Exec..