



Career Transition Readiness Checklist

INTERNAL WORK

1. Document Your Performance and Impact

Create a personal record of your contributions while the information is still accessible.

- ☐ Record key accomplishments, completed projects, and significant responsibilities.
- ☐ Capture measurable outcomes such as revenue generated, expenses reduced, time saved, customer satisfaction, productivity improvements, or risk avoided.
- ☐ Save copies of performance reviews, recognition, awards, positive feedback, and development plans.
- ☐ Write brief examples that explain the challenge, your actions, and the result for future interviews.

2. Increase Your Visibility Appropriately

When leadership is unclear, it is important that others understand your contributions.

- ☐ Ask who is responsible for approving work and setting priorities during the transition.
- ☐ Confirm and document which of your responsibilities are the highest priority and which can be paused.
- ☐ Provide weekly concise updates on progress, results, risks, and upcoming priorities. (Consider being the consolidator of information from the full team to the interim leader).
- ☐ Volunteer for work that is valuable, visible, and aligned with business needs. (Avoid taking on so much additional work that you become overwhelmed or unable to deliver consistently.)

3. Strengthen and Organize Your Contacts

Make sure your professional relationships are not dependent on access to your company email or systems.

- ☐ Update personal contact information for trusted colleagues, mentors, former managers, clients, and business partners.
- ☐ Connect with appropriate colleagues on LinkedIn or another professional platform. Keep a private list of people who could serve as references or make introductions.
- ☐ Do not download confidential company contact lists or proprietary information.



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4. Build Relationships Beyond Your Immediate Team

A strong internal network can create options during a reorganization or leadership transition.

- ☐ Schedule conversations with peers and leaders in departments that interact with your work. Learn about their work and business priorities.
- ☐ Learn about their business priorities, and potential areas of growth.
- ☐ Look for opportunities to contribute to cross functional projects, committees, or employee groups.
- ☐ Focus on building genuine relationships rather than contacting people only when you need assistance.

5. Understand Available HR Resources

Identify resources before you are in a stressful situation and need to locate them quickly.

- ☐ Save the contact information for Human Resources, Employee Relations, benefits support, payroll, the Employee Assistance Program, and any internal career mobility team.
- ☐ Review where policies regarding severance, paid time off, retirement accounts, healthcare continuation, and internal job applications are located.
- ☐ Keep recent pay statements, benefit summaries, tax documents, and employment agreements in a secure personal location.
- ☐ Review any confidentiality, non-solicitation, intellectual property, or repayment agreements you have signed.

6. Assess Internal and External Opportunities

Preparation should include more than one possible path.

- ☐ Review open roles within the company. Identify and apply for positions that align with your skills.
- ☐ Research external roles, employers, salary ranges, and required qualifications.
- ☐ Identify any skill, certification, or experience gap that can be addressed now.



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EXTERNAL WORK

1. Update Your Resume and Professional Materials

Do not wait until you need a resume to begin updating it.

- ☐ Add your current role, responsibilities, accomplishments, and measurable results.
- ☐ Create a master resume that includes more detail than you would use for a specific application.
- ☐ Update your professional bio, LinkedIn profile, and internal employee profile.
- ☐ Prepare a short explanation of your role and the value you bring to the organization to use in conversation with new connections.

2. Increase Your External Visibility Appropriately

Make sure your experience and expertise are visible beyond your current organization.

- ☐ Engage consistently on LinkedIn by sharing relevant insights, commenting thoughtfully on posts, and reconnecting with former colleagues, mentors, and professional contacts.
- ☐ Attend industry events, professional association meetings, conferences, and community gatherings to build relationships beyond your current company.
- ☐ Consider volunteer, board, committee, or skills-based service opportunities that allow you to contribute your expertise, develop new capabilities, and build relationships with people across other organizations and industries.

3. Review Your Financial Readiness

Preparation can reduce the pressure to make rushed career decisions.

- ☐ Review monthly expenses and identify costs that could be reduced temporarily.
- ☐ Build or protect an emergency fund when possible.
- ☐ Understand what benefits may end if employment ends and what expenses may increase.
- ☐ Avoid making major financial commitments based on the assumption that your current income is guaranteed.



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4. Prepare Your Professional Story

Be ready to explain your experience confidently and without sounding fearful or negative.

- ☐ Develop a clear summary of what you do, what you do well, and what kind of opportunity you are seeking.
- ☐ Prepare examples that demonstrate leadership, adaptability, problem solving, collaboration, and results.
- ☐ Practice explaining a potential reorganization or job loss in neutral language.
- ☐ Avoid criticizing current leaders, sharing rumors, or presenting speculation as fact.

5. Complete a Skill Refresh

Revisit skills you haven't used recently and determine whether a quick update would strengthen your confidence and performance.

- ☐ Identify 1–2 micro-skills you can strengthen in the next 30 days (e.g., Excel shortcuts, project management basics, coding refresher, communication frameworks).
- ☐ Take a short course or webinar to boost confidence and marketability.
- ☐ Update your portfolio or work samples with recent projects and/or add certifications and courses to your LinkedIn.

6. Create a Personal Transition Plan

A written plan will help you respond thoughtfully if circumstances change quickly.

- ☐ Identify the first five people you would contact if your role changed.
- ☐ Create a list of target positions, companies, and internal teams.
- ☐ Set a weekly schedule for networking, resume updates, skill development, and job research.
- ☐ Decide what information you would need to request during a formal employment transition, including dates, benefits, severance terms, internal placement options, and reference policies.
- ☐ Keep the plan current but continue performing your present role with professionalism and care.