

Changing gears

Explorations in the world
after Work



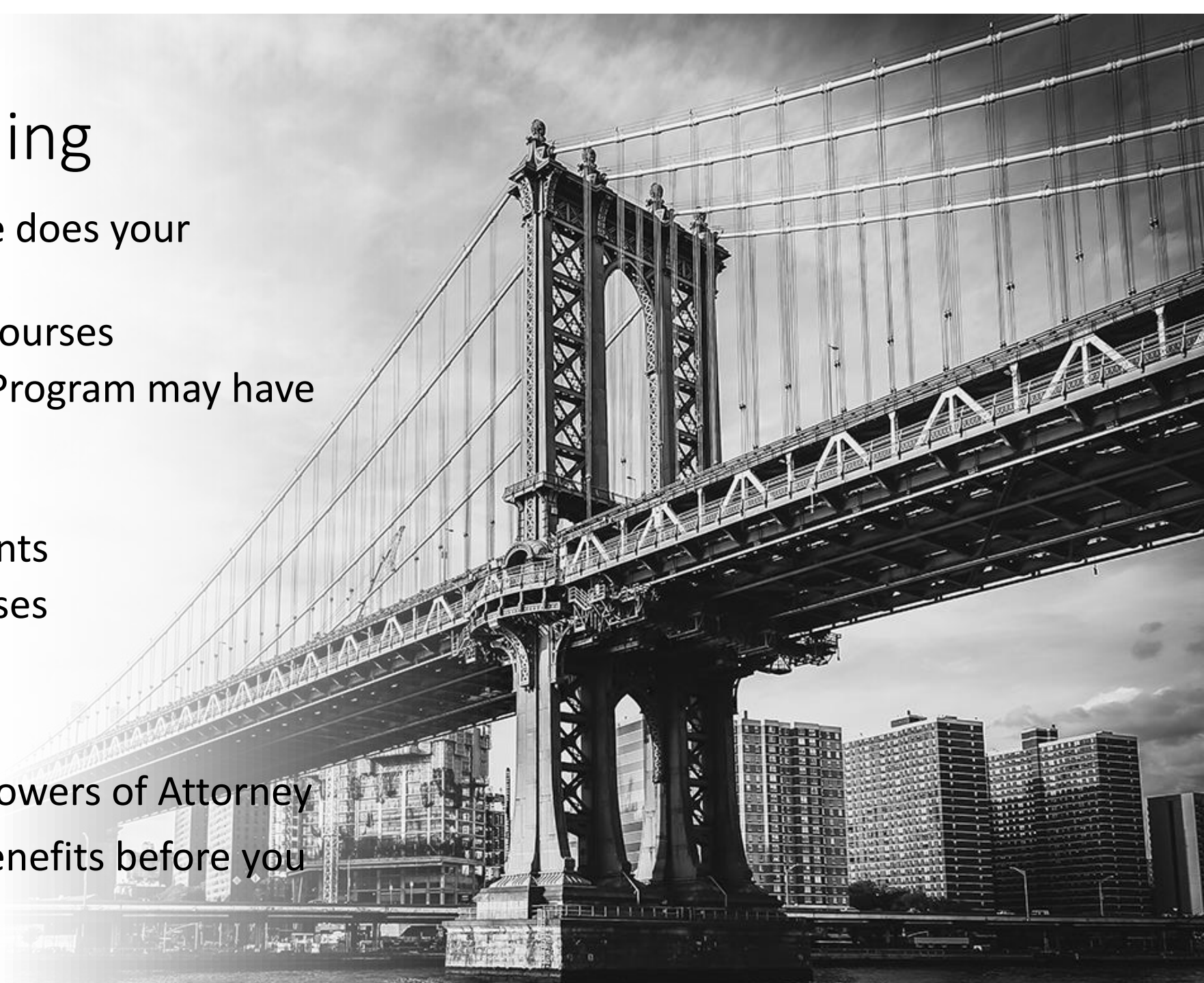
Lanes

- "Structural" planning
 - Financial
 - Notice to organization
- Succession/knowledge transfer planning
- Personal planning



Structural planning

- What guidance/assistance does your organization offer?
 - Retirement planning courses
 - Employee Assistance Program may have information
 - HR department
 - Pension entitlements
 - Paperwork processes
- Seek professional advice
 - Financial advisor
- Review and update will, Powers of Attorney
- Take advantage of your benefits before you leave



Succession planning

Definition: process of identifying the critical positions within your organization and developing action plans for individuals to assume those positions.

Tools for success

- Mentoring
- Back-ups
- Cross training
- Re-distributing work
- Job shadowing

Knowledge transfer

Definition: systematic identification, capture and documenting of critical information. Ensures information is structured, stored and transferred to everyone who could benefit from it.



- **Methods:** shared drive, written documentation, copy on emails; process maps, bring to meetings,
- **Other activities:** meetings, information sessions, training sessions, coaching, mentoring,
- **Documentation:** area of expertise (task, file, projects); working groups/committees/stakeholder lists and relationships; current and past issues/situations

Who are your people

Create a contacts information sheet



**Contact
name &
details**

organization

**Reason for
connecting**

Tools and resources



Create an accounts and password information sheet

Account and location

User credentials

Associated task

Action items

What are your critical actions/
projects/to dos



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Area of
expertise/
project/tasks

Information
bank (where
or who has
the
information)

Timelines for
completion
include
dependencies

Challenges

- Protocols
- Contentious issues
- Personality related issues
- Work arounds, mentors who might help (informal relationships)

CHALLENGE





Personal Planning

- Who do you WANT to be?
- Who do you NEED to be?
 - Supporting aging parents, kids/grandkids
 - Is your partner still working?
- What are you going to do next?

The feelings piece

Recognize that there is an aspect of grief to retirement

Seek help from family, friends and others in processing

Find a new "tribe" or renew connections with previous networks

Where do you want to spend time and effort?



Is your current home the right place for the future you are building?

Yes: Consider home repairs while you are still on your full salary

No: Where do you want to live to meet your lifestyle goals?



What activities or commitments from your current life do you want to maintain?



What new activities or commitments do you want to add?

Louise's top 5 tips for a successful retirement

- Hang loose and enjoy your "Pivot" skills
- Keep a scrapbook of things that strike your fancy (classes you are interested in, places to visit, things to do, etc.)
- Nurture relationships that continue outside work
- Be adventurous – try new things in all areas (exercise/health, hobbies and crafts) to narrow down what you want to do before investing big time into the activity
- Take care of yourself



Wendy's top 5 tips for a successful retirement

- Don't over-promise your time
- Be deliberate about connecting with people
- Make sure you have time for physical activity
- Find ways to create/use your brain
 - Volunteering
 - Art/crafting
 - Lectures, galleries, museums
- Let it go

