Best Practices for Transitions and Onboarding

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- Determine Timelines
- Determine Key Players
- Communication, Communication, Communication
- Set Clear Expectations
- Marketing Considerations

TRANSITIONS ARE OPPORTUNITIES

Every step in the transition process is an opportunity for the journal. Think about how you can streamline the process.

Prior to the transition, do a SWOT analysis and think critically about how the journal can use this transition to improve.

MANAGING TIMELINES

What is the date of the official transition?

Create a timeline backwards from the official transition date. These might include:

- Site transition dates
- System/submission transition dates
- Issue/production transition dates
- Marketing

Monitor each date and communicate with the key players in advance of these dates to ensure that the schedule stays on track.

KEY PLAYERS

- Get clarification on who the key players are
  - Who are the decision makers?
  - Who should be looped in?
  - For journals, what editors need to be included? How much say should they have?
  - For society's, who needs to be involved? Does someone have final say?
  - Who can be counted on for quick responses?

COMMUNICATION

- Schedule regular calls with the key players during the transition
- Create live, shared tracking sheets
- Create policy documents and keep them up to date
- **There is no such thing as overcommunication**

SETTING OVERALL EXPECTATIONS

What are the goals for the transition?

What is the timeline?

What defines a successful transition?

SETTING EXPECTATIONS: ONBOARDING NEW PROJECTS

Determine what information you already have and what you need. Determine who the main contacts for getting information are.

Establish a timeline and schedule as much overlapping time with anyone who will no longer be working on the project as possible.

If protocols are incomplete or confusing, use this as an opportunity to revise them.

SETTING EXPECTATIONS: ONBOARDING NEW STAFF MEMBERS

Determine realistic goals and share them with the employee so they know what is expected and what determines success in your organization.

Foster team mentalities – even in small groups or among small journals, give new employees support from other team members besides their supervisors/trainers.

Encourage them to ask questions – again, there is no such thing as overcommunication.

SETTING EXPECTATIONS : SYSTEMS TRANSITIONS

Have a realistic timeline, and then add some time to that.

Temper expectations – no site is perfect, and no transition goes perfectly. Try to use the systems to their best of their capabilities.

Arrange for appropriate staff support both during the transition and after it has completed and is on the new system.

SYSTEM TRANSITIONS

- Have definite dates (and times) for site transitions
    - When can manuscripts be submitted on the new system?
    - When will you stop allowing new submissions on the old system?
    - When will you stop allowing REVISED submissions on the old system?
    - When will you no longer have access to the old site?
    - When should editors have all decisions made?
    - Consider weekends, holidays, and important dates to all involved.

SYSTEM TRANSITIONS

- Be sure to review:
    - Workflow
    - Letter templates
    - Submission questions
- Be prepared for systems transition to take many months, often 1-2 years, to fully complete.
- Have at least one person who can devote a significant amount of time each day to overseeing the transition.
    - Someone should be prepared to answer a lot of questions from all parties during the transition and have time to keep everything on track. This person should also understand who the key players are and know who else to loop in (remember, you can't overcommunicate).

SYSTEM TRANSITIONS

- Decide how much say each party should have. Especially with very customizable systems, keep in mind how much time you have, your goals, and the most important issues you want to rectify with this transition. You can't fix everything – especially on time and financial budgets.
- Each system has pros and cons.
  - DO consider those pros and cons and use each system as advantageously to your journal as possible.
  - DO NOT try to make one system look or act like another.
- Consider what each one does well and does not do well realistically and use the opportunity of a system transition to streamline your workflow and simplify your processes.

SYSTEM TRANSITIONS

- Consider what each one does well and does not do well realistically and use the opportunity of a system transition to streamline your workflow and simplify your processes.
- Work with the production team to develop a plan for manuscripts accepted on the old system to be sent to the new production system. Communication is key!

SYSTEM TRANSITIONS

- Work with the developer to negotiate the transition process well including making sure you have adequate hours for them to work on the site, appropriate support during and after the transitions, and that you have a plan for your internal/external support once the transition is complete.
- Document all requests for changes for reference at a later date if needed. A shared spreadsheet can also be helpful if multiple people are working together on changes.

REVISING JOURNAL PROTOCOLS

- Have one point person responsible for revising protocols and gathering all needed information from other parties
  - During a transition, hopefully you also have one point person keeping the transition moving ahead who can also serve in this role
- Does not have to be completely exhaustive
  - Protocols should cover necessities of the journal workflow, but do not need to describe the submission system in depth or deal with situations that are rare
  - Hit the highlights
- A good test of using a protocol is to run it past someone not familiar with the journal
  - They should be able to easily find all the information they would need for standard, day-to-day journal operations

REVISING JOURNAL STYLE GUIDES

- Less is often more – use a base style like Chicago or AMA and only note in the journal guide any deviations from that base style
- Spend some time collecting examples of questions you get from relevant parties (e.g., authors, editors, copyeditors, and production staff) to help you understand the pain points that need to be addressed
- Check your style against your author guidelines
  - This can also helpful to do with protocols
  - Ensure nothing is contradictory or confusing
- Check industry and field trends frequently, especially things like terms for specific populations or disease names, to ensure you are keeping style guides up to date

MARKETING CONSIDERATIONS

- What do you want to communicate about the transition?
  - Dates for transition, benefits of transition, links for new sites, how to login to new sites
- Who do you want to communicate to?
  - Authors/reviewers, society members, readers, others
- Who will the messaging be coming from?
  - Society, publisher (new or old), editorial office
- What is the timeline for marketing communications?
- How will marketing communications be sent?
  - Email blasts, messaging on sites, etc
- Redesign and branding

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