

"To The Executor Of My Experience . . ."

Using Letters To Carry Over Job Information

THOMAS E. ANASTASI, JR.

"No one here is indispensable. Our organization is set up so that if a man should leave, or not be available for some reason, the operation would continue to function smoothly."

All of us like to feel that our companies or departments are set up in this highly efficient fashion — and we have charts and job descriptions to prove it. Unfortunately, in spite of any documentation we may allege, these well-oiled administrative machines seldom exist. The incumbent in any job has built up a mental file of short cuts, informal procedures, and general tricks-of-the-trade. If he has time to give these to a successor, then the operation may flow along with a minimum of turbulence. If the change is sudden, due to sickness, death, or quick transfer; or if the change is temporary, due to out of town business or vacation, then the loss of this man heretofore expendable, may become critical.

There is probably no system which can completely overcome this problem

of change. There is a device which can minimize the sometimes shattering effects of change. It is so flexible and informal that it doesn't have a normal name. Some in the military services have made use of it, and called it a *Relief Letter*. This name should do as well as any, but each user is free to apply his own term to it. The military, of course, probably have more experience than anyone with sudden catastrophic change in assignment; and the fact that this device has tested out successfully on this administrative obstacle course recommends it.

The relief letter is essentially an open letter to an unknown successor or temporary replacement. It helps a new man, even if the previous holder of the job is still available, as it shortens the change-over time and serves as an outline for discussions between the old and new man, insuring that none of the important formal and informal procedures are left out.

The preparation of the relief letter is

THOMAS E. ANASTASI, JR. is an Administrative Assistant to the Dean of Continuing Education at Northeastern University where he teaches communications. He has been associated with the training activities of the Bethlehem Steel Company, the Industrial Education Institute, the U.S. Navy, and the University of New Hampshire. He received his B.S. in Sociology from Holy Cross College and has done graduate work in education at Northeastern University. Mr. Anastasi is Chairman of the Publication Committee of the Massachusetts Chapter of the ASTD.

not a one-time task. To be sure, the initial preparation is the most extensive, but to be of greatest value the letter must be up to date. This means a program of review at least quarterly . . . review, and such addition and deletion as changing times may call for.

There is a hidden benefit, in addition to the value of the letter in the change process. Its preparation forces a close look at the objectives of the job and of the writer's success in meeting them.

This is an informal document. Any attempt to formalize it will surely destroy it as a person to person communi-

cation—and this it must be. This is not a corporate function. It is not a third person passive voice job description. This is a letter. It is a bridge over a gap.

What should be included in this letter? This will vary with the job, but it would seem that any management position relief letter should include most of the points in the example below, though not necessarily in this form. In fact, it should not be in any set form, but should express the writer's ideas as he can best express them. The example is given to illustrate some points which the writer might want to consider.

Dear Sir:

I am writing this letter to acquaint you with your job as I see it. I have held this job since, and think that some of my experience may be helpful to you. Most of the formal information concerning the job and its requirements is available from other sources, so I'll emphasize the informal aspects of this job.

The general requirements of the job are:
But, as you might expect, there are a number of other things which enter into it. Though there are no formal requirements that you do them, the following tasks have become associated with your office:

The organization charts will tell you who your superiors are. My work with them has suggested the following ways of dealing with them, and of preparing things for them:

You have by now met most or all of your subordinates. Again you can look to the organization charts and job descriptions for their specific duties. Some of these people are more proficient than others in certain areas. They are:
Along with this there are, naturally, certain weaker areas:

I have established certain informal policies and procedures in my relations with the personnel of the department. You may want to change them, but I think that you should be aware of them.

You will have formal communication with

I have found it valuable to maintain informal contact with:
. because; and
with for

You are responsible for the following reports:

<u>TITLE</u>	<u>PURPOSE</u>	<u>TO</u>	<u>REFERENCE</u>	<u>COMMENT</u>	<u>DUE</u>
--------------	----------------	-----------	------------------	----------------	------------

The following reports are made to you:

<u>TITLE</u>	<u>PURPOSE</u>	<u>FROM</u>	<u>REFERENCE</u>	<u>COMMENT</u>	<u>DUE</u>
--------------	----------------	-------------	------------------	----------------	------------

The following books, publications and files should be of help to you:

<u>TITLE</u>	<u>LOCATION</u>	<u>PURPOSE</u>
--------------	-----------------	----------------

My major recurring problems have been This is what I
 have done to meet them.

In addition to the above, I think that these odd bits of information, what you
 might call "tricks-of-the-trade," will be of help to you. They have been to me.

I hope that this has been of help to you. If it has, then why don't you start now
 to assemble some notes, so that once you get into the swing of things here, you will be
 able to write a letter like this to the man who will follow us both. Your experience
 will be of help to him.

Cordially,



Western Conference At Famous Mission Inn

Things seem to be getting better and better out West. This year, the Twelfth Western Training Conference will be held November 6-7-8th at Riverside, California in the world famous Mission Inn. A recent article describes the setting as follows: "In the block-square gardened castle that is the Mission Inn, you will find literally a thousand things you would otherwise have to travel the world for; art galleries rich in fine paintings, corridors filled with historic collections, mysterious catacombs, chapels jewel-lighted through stained glass . . . For more than three quarters of a century presidents, emissaries, and royalty

have come here." To all of this, the Inn adds variety, atmosphere, hospitality, and comfort.

In these surroundings you may expect the outstanding training conference for 1963. Included will be speakers of national acclaim, and concurrent sessions on vital topics of interest to training people from industry, business, government, and schools. Also included will be the famous "Trading Posts." When the conference is over, you will find yourself close to many of California's attractions . . . Disneyland, Knotts Berry Farm, Palm Springs . . . to name just a few. It all adds up to a *must* on your calendar.