

Onboarding & Off Boarding Strategies
Michigan School Business Officials
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10:45 – 11:45 a.m.
Room 130c

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Agenda

- Introductions
- Onboarding discussion
- Onboarding Best Practices
- Offboarding discussion
- Offboarding Best Practices
- Exit Interviews
- Wrap up and questions



Onboarding

What is Onboarding?

- Provide employees the knowledge and tools necessary to succeed in new position.
- The bridge between the hiring process and productivity.
- Pre-employment through the end of the first year.
- Managers are best positioned to take charge of the onboarding process.
- Employees are deciding if they like the company, culture, and position.

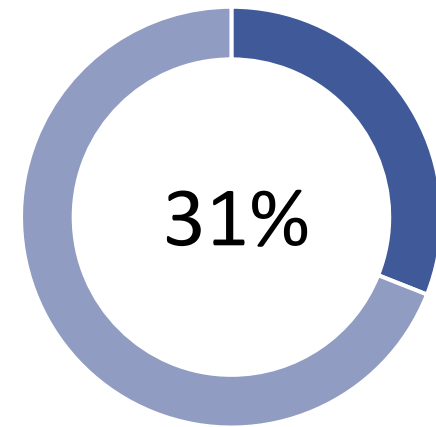


Importance

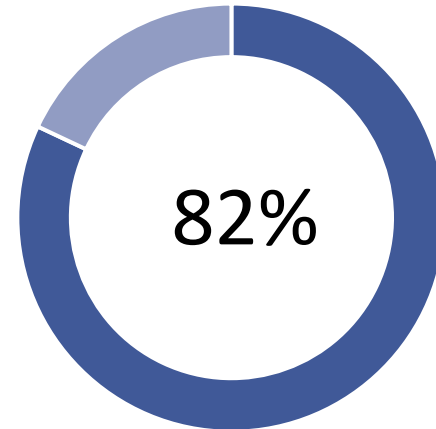
- Onboarding is crucial to ensure high retention.
- Successful onboarding programs can lead to:
 - higher job satisfaction
 - increased employee participation and performance
 - lower turnover rates within an organization

Did you know?

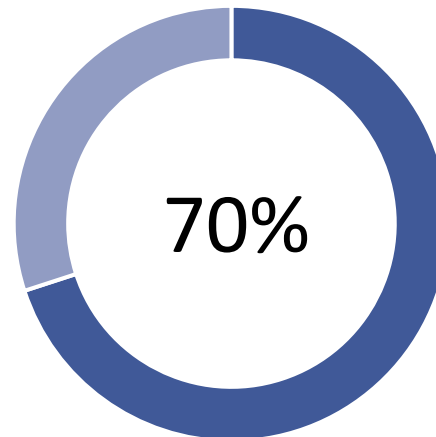
31% of people have quit a job within the first 6 months.



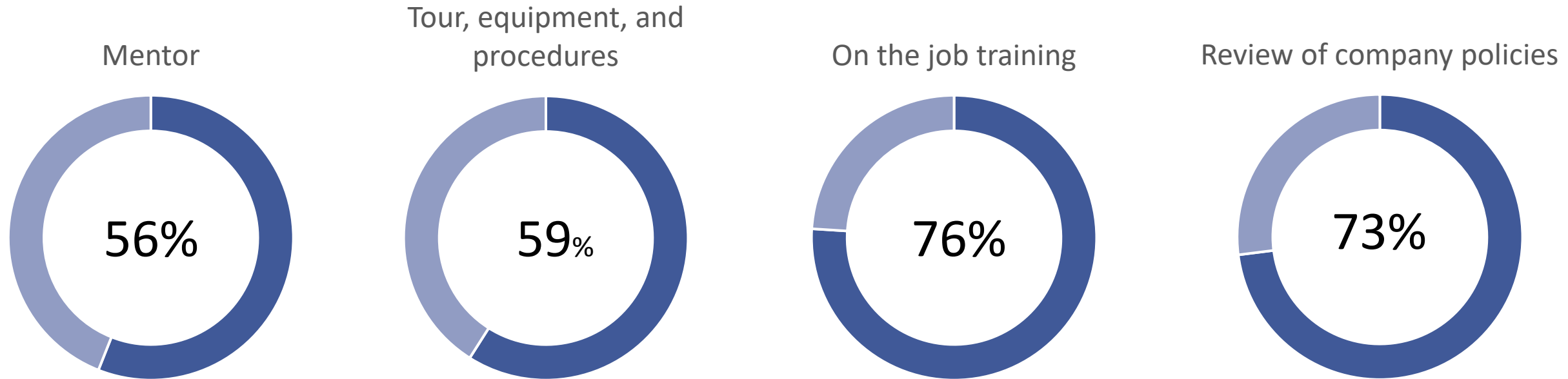
Companies with a strong onboarding process improve new hire retention by 82%.



Companies with a strong onboarding process improve new hire productivity by over 70%.



What do new hires want their first week on the job?

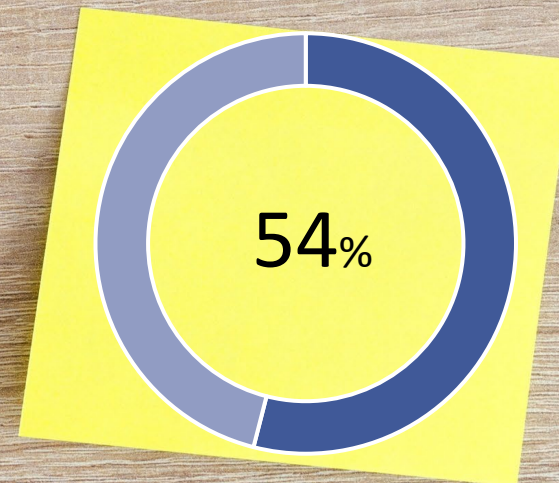
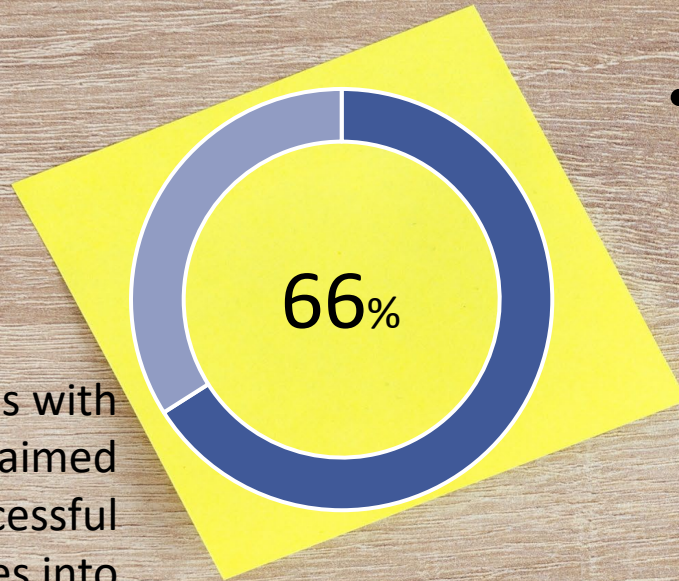


New hires want to learn how to do their job within their first week in order to start doing meaningful work and contribute as quickly as possible.

Goals of Onboarding

- Teach new hires about the mission, vision, values and culture of the organization.
- Proper onboarding ensures that new employees fully understand their roles and how they relate to the organization's operations.

66% of companies with onboarding programs claimed a higher rate of successful assimilation of new hires into company culture.

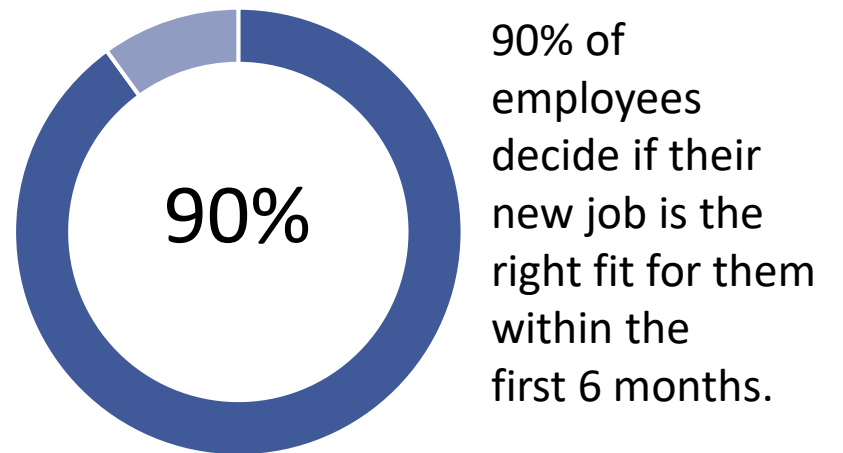
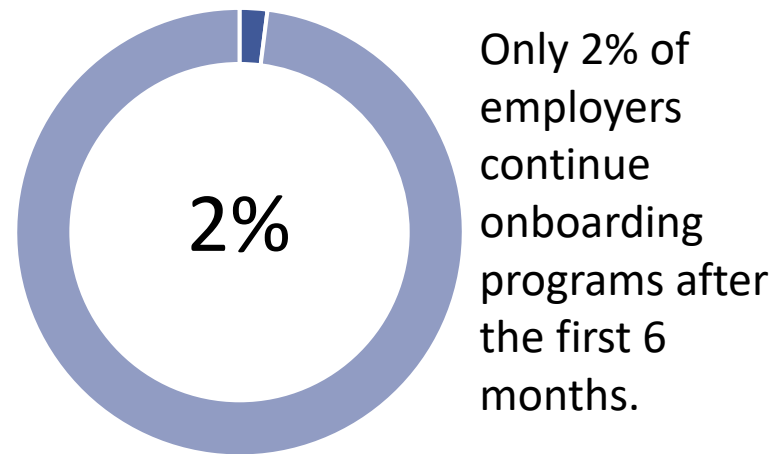
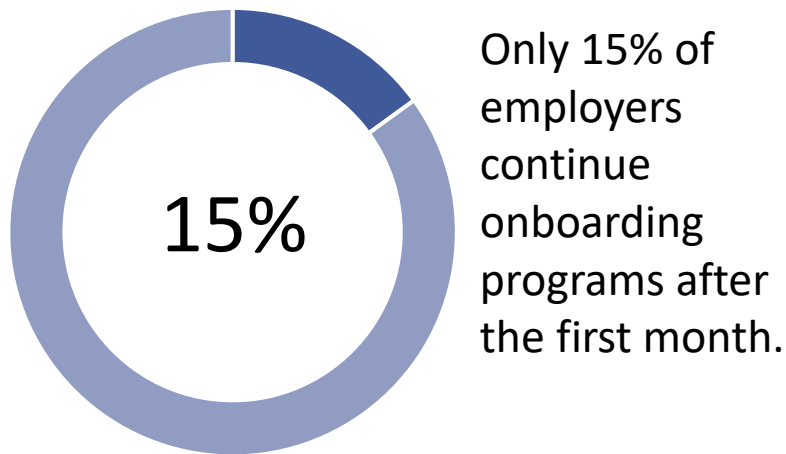


54% of companies with onboarding programs reported higher employee engagement.

Engagement

- Three critical drivers of employee engagement: onboarding, talent development, and talent retention.





Did you know?





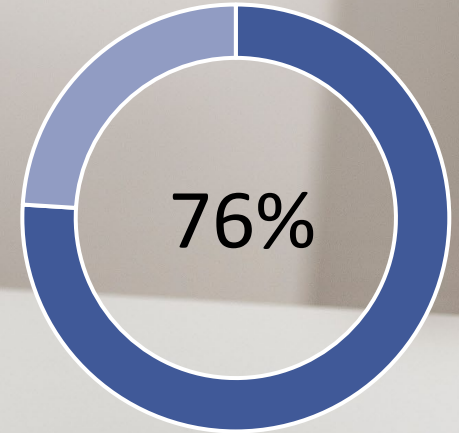
Culture



- Honesty during the hiring process about company culture, type of work, management style, and responsibilities.
 - Direct communication
 - Set up weekly check-in's and answer any questions that may arise.
 - Create an emotional connection between the new hire and the organization.
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Training

- Develop clear guidelines and training plans.
 - Extend onboarding programs longer than an employee's first week.
- Review organized, relevant, and well-timed content.
 - Content is only valuable if new employees know how to apply it.
- Review onboarding progress periodically.
 - First week, 30, 60, 90 days, 1 year

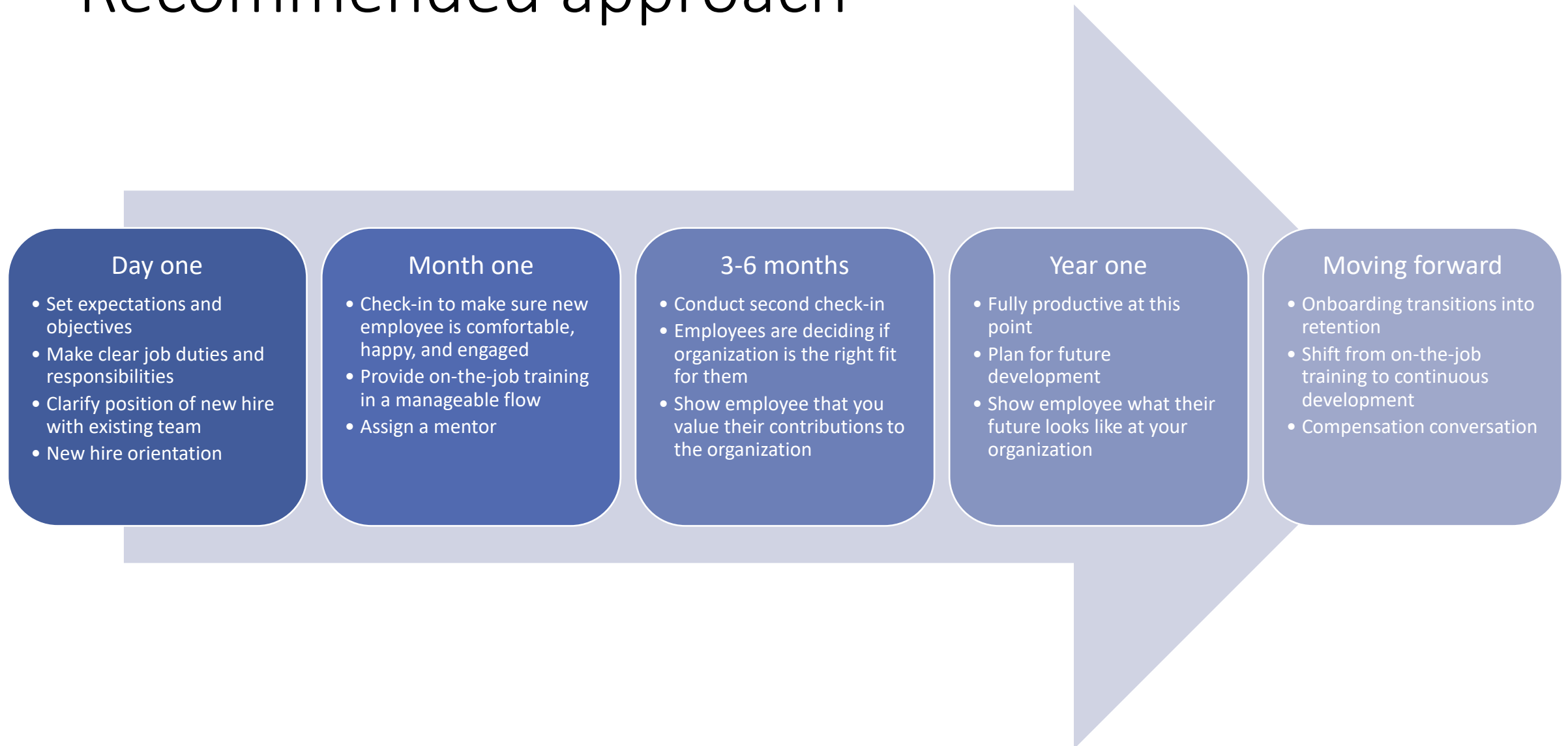


76% of new hires agree that on-the-job training is the most important thing a new employee needs to get up to speed and begin contributing quickly.

Mentorship

- Management and mentors need to provide early feedback and clear expectations.
- New employees seek belonging and collaboration with other employees.
- Help employees make personal connections with co-workers.

Recommended approach



Onboarding Dashboard Example

ACTIVITY TYPE	CLOSED	STATUS	ACTIVITY MONITORED BY:	ACTIVITY NOTES
PRE-START DATE ACTIVITIES				
Offer Accepted, Signed and Returned	Yes	Completed	Talent Acquisition	DocuSign: Approval Needed by Finance
New Hire Info Added to Calendar	Yes	Completed	Talent Acquisition	Reports To, Location, Department, Picture
Calendar Invite sent to Manager, L&OD, IT	Yes	Completed	Talent Acquisition	Start Date: New Hire Info
New Hire Welcome Email Sent	Yes	Completed	Talent Acquisition	New Hire Survey, Systems Access Notice, Covid19
Equipment Prepped and sent to New Hire	Yes	Completed	IT Department	Equipment Specified: MacBook, Microsoft Laptop
Add User Access to Various Aps	Yes	Completed	IT Department	Slack, Outlook, Sharepoint, Bonusly
Prep for System Access (Outlook, Slack, Etc)	Yes	Completed	IT Department	Connect with IT/HelpDesk to Confirm
Background Check	Yes	Completed	IT Department	Use GoodHire and Internal Company Source
Setup in UltiPro for Onboarding (I-9, Active, Etc)	Yes	Completed	Benefits Specialist	Double-Check Information From Offer Letter
New Hire First Day Agenda Email	Yes	Completed	L&OD	Schedule for Day 1, Zoom Info, Start Time

DAY 1 ACTIVITIES

Day 1: Welcome to Our Company Presentation	Yes	Completed	L&OD	Personal Introductions & Day 1 Agenda
Day 1: Vision, Mission, Values Presentation	Yes	Completed	L&OD	Presentation on Vision, Mission, & Values
Day 1: Tools of the Trade Presentation	Yes	Completed	L&OD	Introduction Into Company's Systems
Day 1: New Hire IT Session	Yes	Completed	IT Department	Confirming Access To: Office, Slack etc.
Day 1: Lunch With Team	Yes	Completed	Manager	Get to know your Team!
Day 1: Benefits and Perks 101 Presentation	Yes	Completed	Benefits Specialist	Medical, Commuter, UltiPro, Benefits etc.
Day 1: Our Company's Ecosystem	Yes	Completed	L&OD	Our Platform, Industry Basics, Collabs
Day 1: Company Employment Structure	Yes	Completed	L&OD	Leveling and Growth Opportunities
Day 1: Setting Yourself Up for Success Pres.	Yes	Completed	L&OD	Stress, Time Management, Goal Setting

WEEK 1 ACTIVITIES

MGR: Introductory Meeting	Yes	Completed	Manager	Day 1: Monday @ 11:30am After Team Lunch
MGR: Key Responsibilities Overview	Yes	Completed	Manager	Prepared Prior to 1:1
MGR: Review Team Organizational Chart	Yes	Completed	Manager	Internal Team Leveling
MGR: Key Partners List	Yes	Completed	Manager	Individual Team Member Core Functions
MGR: Schedule Recurring 1:1 Meetings	Yes	Completed	Manager	Schedule During Introductory Meeting
MGR: Finalize 30, 60, 90 Day Goals/ Objectives	Yes	Completed	Manager	Project Lists, Team Goals, Individual Purposes
HR: Follow Up Email	Yes	Completed	L&OD	First Week Overview, Remaining Questions
HR: Enroll in Benefits	Yes	Completed	Benefits Specialist	Reminder Email/Confirmation Prior to Enrollment
HR: Confirm Title, Pay, Bonus Match Offer	Hold		Benefits Specialist	Connect w/ Talent Acquisition to Obtain Offer
Letter When Running First Payroll				Letter

30 DAY ACTIVITIES

Send 30-Day Check-In Survey to the Employee to Complete Prior to Acclimation Review Meeting	Hold	L&OD	30-Day Check-In Survey Link
Acclimation Review: Examine Progress Towards Short-Term Goals and Needed Support	Hold	Manager	Additional 1:1 Meeting Btwn MGR and New Hire to Review First 30 Days, and Plan For Next 30 Days

60 DAY ACTIVITIES

Send 60-Day Check-In Survey to the Employee to Complete	Hold	L&OD	60-Day Check-In Survey Link
Schedule 1:1 Between Employee and HR	Hold	L&OD	Evaluate the Employee's Familiarity With the Organization's Mission and Values; Ask for Feedback Regarding Personal Job Satisfaction and Concerns
Schedule 1:1 Between Employee and MGR	Hold	Manager	Identify 3 Accomplishments for Praise; Identify 3 Accomplishments for Improvement; Discuss Longer-Term Performance Goals

90 DAY ACTIVITIES

Send 90-Day Check-In Survey Employee to Complete Prior to Performance Reviews	Hold	L&OD	90-Day Check-In Survey
Send Performance Reviews to Both Employee and Manager to Finish Promptly	Hold	L&OD	Email Both New Hire and Manager a Link to Performance Reviews; Send Follow-Up Reminders
Send Guidelines for Non-Biased Performance Reviews	Hold	L&OD	Eliminating Bias From Appraisals
Schedule 1:1 Between Employee and HR to Discuss Performance Reviews and Acclimation	Hold	L&OD	Review 90-Day Check-In Survey Responses and Performance Reviews
Schedule 1:1 Between Manager and HR to Discuss Performance Reviews	Hold	L&OD	Review Talent Acquisition Success; Was the New Hire a Good Fit? How Was the Onboarding Process? Follow Up With an Email to the New Hire Regarding Their 30-60-90 Onboarding Experience
Request The Employee Complete an Onboarding Experience Questionnaire	Hold	L&OD	Review New Hire Development; Opportunities For More Responsibility; Problems and Concerns; Next Steps
Schedule 1:1 Between Employee and Manager to Discuss Performance Reviews	Hold	Manager	



EMPLOYEE OFFBOARDING PROCESS



What is offboarding?

- Employee's last and lasting impression as they separate from your organization.
- Considerable focus and time is placed on onboarding can be diminished by ignoring offboarding.
- Applies to all departing staff, quits, retirees, transfers, and terminations.



What is and isn't offboarding?

- Social media has increased the influence departed employees can have.
www.Glassdoor.com has an extensive library of information and ratings about organizations.
- Applicants are interested in the culture, mission, and social presence of your organization.



What should be included in offboarding?

- Communicate the departure
- Facilitate knowledge transfer
- Recover company assets
- Update system access
- Disposition of final pay, benefits (COBRA rights), leave time, etc.
- Conduct a meaningful exit interview
- Providing exit documentation



Offboarding Checklist

Responsibility	Task	Completed?
Manager	Tell the team about the departure	<input type="checkbox"/>
Manager	Assign tasks to the responsible team	<input type="checkbox"/>
Manager	Schedule handover meeting	<input type="checkbox"/>
Manager	Ask for role documentation	<input type="checkbox"/>
Manager	Gather useful resources	<input type="checkbox"/>
Manager	Request outstanding tasks	<input type="checkbox"/>

Offboarding Checklist

HR

Complete final pay

☐

HR

Remove from payroll

☐

HR

Schedule outstanding reimbursements

☐

HR

Hold exit interview

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HR

Send exit questionnaire

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Offboarding Checklist

IT

Request outstanding tasks



IT

Redirect emails



IT

Disable access

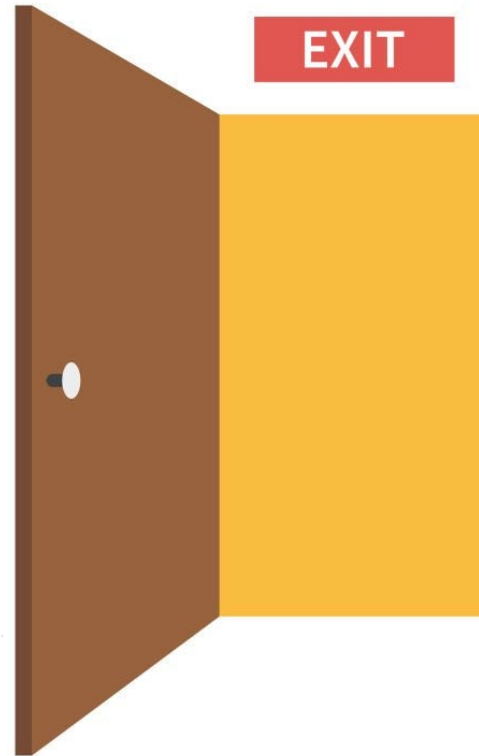


IT

Recover computer, phone,
and equipment



Exit Interviews



What are and aren't they?

- Meeting with outgoing staff members with the purpose of gaining information beneficial for the organization.
- Covering topics ranging from quality of supervision and leadership to work environment and benefits.
- Applied consistently for all departing staff members.
- Monitored and reported to management.
- Not a check list of things to do on an employees last day.
- Not a chance to demean or “take parting shots” at coworkers, supervisors, or the organization.

Purpose and Potential Benefits

- Exit Interviews can:
 - Be an early warning system regarding organizational issues.
 - Provide honest feedback, departing staff “have nothing to lose”.
 - Identify areas of supervisory strength and weakness that can be addressed and developed.
 - Address existing and prevent future issues regarding violations of employment policies, laws, and regulations.



Purpose and Potential Benefits

- Exit Interviews can:
 - Evaluate and improve the cultural climate in the organization.
 - Provide feedback on cultural and climate issues in the organization.
 - Address positions chronic turnover issues for improvement.
 - Validate presumptions about salary and benefits.





Typical Exit Interview Formats

- Online questionnaires.
- In person interviews, unstructured.
- In person interviews, structured with set questions.
- Essay format.
- Scale format.
- Administered before separation.
- Sent to departing staff member after separation.

Exit Interview Format Example

Name	<input type="text"/>	Position	<input type="text"/>	Last Day Worked	<input type="text"/>
Service dates	<input type="text"/>	Was written resignation given?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Why are you leaving?

What is the primary factor listed below:

☐ Location ☐ Salary ☐ Shift ☐ Benefits ☐ Opportunity for professional growth ☐ Other

WERE YOU SATISFIED WITH...

Your job: *(fit with interest and abilities, opportunities, work load)*

Supervision and management: *(fairness, competence, supportive open channels of communication)*

Co-Workers: *(helpful, friendly, competent)*

Policies and practices: *(fairness, working environment)*

Salary and employee benefits: *(fairness, working environment)*

Who Should Conduct Exit Interviews

- Not the direct supervisor.
- Not a coworker.
- HR (but not always)
- Outside company
- Someone who is perceived to be
 - Objective/independent
 - Trusted
 - Confidential
 - Position of authority/management
 - Sound of judgement



What do you do with the information and who should it be shared with?

- Take action:
 - Immediately communicate results.
 - Address any areas that involve violation of policy.
 - Investigate and address claims of harassment or other violation of law.
- Who should receive the exit interview results?
 - Direct supervisor
 - Supervisor's supervisor
 - Superintendent/Board
 - Employee file
 - Exit Interview file



What are the risks involved with conducting exit interviews?

- Disruption caused by departing employees with a “grudge” toward his/her supervisor or organization.
- False claims.
- Not acting on issues raised or not acting on a timely basis.
- Perception of supervisors that they are not trusted or their authority is being diminished.
- Creating documents that could be used against the organization in legal proceedings.



Exit Interview Best Practices

- Administering them to all departing staff members.
- Rapid response to issues raised.
- Communicating results and actions to all stakeholders.
- Tracking, analyzing, and reporting trends over time, turnover by department or position, specific issues or areas of dissatisfaction.
- Including initiatives to improve areas deemed to be weakness.
- Holding supervisors responsible for creating a positive work environment for staff.

Final thoughts,
questions,
comments...

4/13/2024



Thank you for your participation!

THANK YOU!

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