

Onboarding and Offboarding

1. Opening
 - a. Think back to the last time you started a new job. How was your first day? Week?
 - b. Did you have any kind of orientation?
 - c. c. How long before you learned the culture of your new workplace? How long before you really felt settled?
2. Onboarding is the welcoming and integration of a new employee into a workplace. It is the process of imparting the skills, knowledge, and behavior that it takes to be successful in an organization.
 - a. Orientation/training aspect
 - i. Orientation is an introduction.
 - ii. Checklists
 - iii. Paperwork
 - iv. Tours
 - b. Socialization aspect
 - i. How do we communicate the culture?
 1. Those unwritten rules
 2. The fun stuff
 - ii. How do we involve the rest of the team?
 - c. Why invest this much time into successful onboarding?
 - i. Staff retention
 - ii. Positive experience
 - iii. Valuable source of information
3. How Do I Do This?
 - a. Stages of Onboarding: Pre-onboarding, Welcoming, Job-Specific Training, Transitioning from a new hire to an employee
 - b. Start before day one (where you can start ticking off checklist stuff)
 - i. Coordinate with your leadership team, integral team members that will be working with the new employee, and anyone else who needs to be involved.
 1. Checklists
 - a. Sample
 - ii. Solid welcome phone call/email with.
 - iii. Send paperwork, manuals, etc. ahead of time, if possible.
 - iv. Send an agenda of the first day and week.
 - c. Welcoming
 - i. First week - follow agenda, build in downtime
 - ii. Build on information rather than dump
 1. General to specific
 - iii. Tours and introductions
 1. Even if not related to job, it's helpful to see all the parts that make the organization function, and it involves the whole team (give them a heads up, let them take ownership over their work)

- 2. It's overwhelming!
- iv. Culture
 - 1. Mission, vision, and history
 - 2. Technology and communication
 - 3. Unwritten rules, lunch room norms, etc.
 - 4. Fun stuff
- v. Job-specific training (never-ends)
 - 1. Define what success looks like.
 - a. Train from systems rather than experience
 - 2. Blended approach
 - a. Reading policy and procedure
 - b. Videos
 - c. Demonstration
 - d. Hands-on
 - 3. Check for understanding
 - a. Open discussion -
 - 4. Allow lots of time for questions/talking through scenarios
 - 5. Mentors/Shadowing
 - 6. Flying solo
 - a. Frequent check-ins
 - b. Allow them to have an impact/exhibit trust
 - 7. Some generalities, but one size may not fit all.
- vi. Transition to full staff member
 - 1. Probationary periods
 - a. 30, 60, 90-day reviews
 - b. **Open-ended Questions**
 - c. Has EPL met your expectations?
 - d. Do you feel welcomed by your team?
 - e. What do you like about your position?
 - f. Can you identify any challenges you have had?
 - g. Do you have what you need to do your job?
 - h. What do you think your strengths are in your position?
 - i. Are you able to communicate with me and with your supervisor/other managers?
 - j. How can I help you in the future?
 - k. What are your goals for the next 30 days?
 - l. **Job-Specific Feedback Based on Essential Duties of the Description**
 - m. **Manager's Goals for Staff Member**
 - 2. Any kind of announcement/notification to other staff?
- vii. Feedback

- viii. Samples from EPL
 - 1. Checklist
 - 2. Schedule
 - 3. Week 1, week 2
 - 4. Niche Academy
 - 5. review questions

Offboarding - the process that completes the end of a professional relationship ideally, a smooth transition

1. Why? Security, knowledge management, and employee retention
2. Circumstances will be different for each departure (retirement, layoffs, personal reasons, termination)
 - a. Understand the nature of the exit
 - b. Treat employees warmly
 - i. Memorable farewell? - thank them, congratulate them, examples from EPL
 - ii. Celebrate achievements
 - iii. Allow them to leave with grace
2. Checklists for everyone involved
 - a. Different scenarios
3. Identify the nature of the exit
 - a. Affects the speed and order of what needs to be done
4. Begin Substitution process
5. Collect Property, erase computers or accounts
6. On last day, remove access
7. Necessary paperwork and final payment.
 - a. Exit letter with expectations/referral info about insurance, COBRA, etc.?
8. Organize an exit interview.
 - a. Reasons
 - b. Sample questions
 - c. Ideally, not a direct supervisor
9. Organize a farewell.
10. EPL examples
 - a. Checklist
 - b. Warm Farewell
 - c. Exit interviews

Involve a lot of planning and time to be done well.

Checklists and organization help mitigate some of that emotional burden of offboarding.